REPORT

OF THE

JUTE ENQUIRY COMMITTEE

1957

GOVERNMENT OF INDIA

114 ICAR—1

JUTE ENQUIRY COMMITTEE

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Members

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CHAPTER I

INTRODUCTION

1.1. Appointment of the Committee.—The Conference on Promotion of Jute Production, held in the Ministry of Agriculture on 12th January 1957, recommended that a Committee be appointed to consider, *inter alia,* the question of requirements of jute and mesta by the Indian jute mills. Accordingly, a Committee was constituted under Government of India, Ministry of Agriculture, Office Memorandum No. 5-16/57-Com. II, dated the 7th March, 1957, with the following members:—

1. Dr. S. R. Sen, Economic & Statistical Adviser, Ministry of Food & Agriculture—Chairman.
2. Shri S. A. Teckchandani, Deputy Secretary, Ministry of Commerce & Industry.
3. Shri A. P. Mathur, Joint Chief Controller of Exports & Imports and Jute Controller, Ministry of Commerce & Industry.
4. Shri K. N. Agha, Secretary, Indian Central Jute Committee.
5. Shri K. C. Basak, Director, Economic Research Indian Central Jute Committee.
6. Shri J. S. Sarma, Deputy Economic & Statistical Adviser, Ministry of Food & Agriculture.

1.2. Due to unavoidable circumstances, Shri J. S. Sarma could not participate in the enquiry and Dr. S. B. L. Nigam, Assistant Economic and Statistical Adviser, Ministry of Food and Agriculture, was appointed in his place as Member-Secretary of the Committee.

1.3. Terms of Reference.—The terms of reference of the Committee were as follows:—

(*i*) To consider the requirements of the jute mills in respect of the various qualities of jute and mesta;

(*ii*) To assess the extent of availability of various qualities of jute and mesta in India including the stocks with mills;

(*iii*) To determine the quantum of raw jute to be imported from Pakistan and to examine the possibilities of stopping or staggering imports from Pakistan of those varieties of raw jute of which there is enough production in India;

(*iv*) To consider as to what extent the Indian jute mills should be allowed stock piling and have carry-over stocks; and

(*v*) To work out and recommend the proportions in which mesta and jute should be grown, particularly whether and how far the growth of mesta should be encouraged in any specified parts of the country.

1.4. Method of Enquiry.—The Committee held its First Meeting early in March, 1957 when it discussed the plan of its work. It was also decided at this meeting to collect from the State Governments all readily available information about the variety-wise production of jute in the various States and also to contact the associations of jute mills, jute dealers, baler's and shippers in Calcutta in order to ascertain as much information as possible about the variety-wise production, consumption, stocks, etc., of raw jute. The next meeting of the Committee took place in Calcutta from 15th to 17th April, 1957 when representatives of the Indian Jute Mills Association, the Jute Balers Association, the Gunny Traders Association, the Jute Fabric Shippers Association, the Bharat Jute Sellers Association and the Bengal Jute Dealers Association were interviewed in the Office of the Indian Central Jute Committee. The Committee had also the benefit of discussion with some of the concerned officers of the Indian Central Jute Committee and of the State Governments. The members of the Committee also visited two jute mills in Calcutta with a view to ascertaining the extent to which mesta was used in the production of Sacking and Hessian as well as to obtain informally the views of the technical men in the mills on the possibility and desirability of admixture of mesta with jute.

1.5. Short-term and long-term aspects.—The Committee considered the problem from two points of views, short-term aspect and long-term aspect. For the short-term aspect, it examined the demand and supply position of raw jute during the next season, *i.e.*, 1957-58, while for the long-term aspect, the various terms of reference were considered in so far as the position during the Second Five Year Plan period is concerned. On the basis of the discussions held with the various jute interests at Calcutta on 16th and 17th April, 1957 the Chairman of the Committee gave an outline of the short-term measures, which in the view of the Committee, were to be taken immediately for improving the production and quality of jute during 1957-58 season, to the meeting of the State Governments' representatives, held at Calcutta, under the Chairmanship of the Vice-President and Additional Secretary, ICAR, on 18th April, 1957. A gist of the short-term recommendations made by the Chairman at this meeting, is given in Appendix A-IV.

1.6. The Final Meeting of the Committee took place on 6th July, 1957 when the Report was finalised.

1.7. Plan of the Report.—We have divided our Report into nine Chapters. After a brief Introductory Note, we have examined in the Second and Third Chapters the requirements and availability of raw jute and mesta during the Second Plan period. In these Chapters we have also tried to examine the variety-wise requirements and availability of raw jute and mesta; the deficiency in supply has been worked out tentatively and some suggestions have been offered for meeting it as early as possible. In the next Chapter, the policy which in our opinion should be followed with regard to the quantum and staggering of imports of raw jute from Pakistan, has been explained. The important problem of mesta production has been considered by us in the Fifth Chapter. In the Sixth Chapter the question of fixation of minimum price of jute and problems connected with it have been considered. The stock policy of mills with regard to raw jute has been discussed in the Seventh Chapter. The eighth Chapter deals with some measures for the improvement of quality, marketing and transport of raw jute. Some of these may not fall directly within our terms of reference but since they are important matters and have a bearing on the issues referred to us, we have thought it fit to include them in the Report. In the last Chapter we have given a summary of our conclusions and recommendations.

1.8. Since the Government desired to have the views of the Committee as early as possible, we have confined ourselves to the basic problems which concern today the production of raw jute and mesta in the country. We could not obviously examine all the aspects of the jute economy of the country, particularly those facing the jute goods industry as neither our terms of reference warranted such a detailed examination nor was the short time available to us sufficient for the purpose.

1.9. We wish to convey our thanks to the various representatives of the trade, particularly the Chairman of the Indian Jute Mills Association, who responded to our invitation most ungrudgingly, and offered their advice on the various problems facing the raw jute economy at the moment.

1.10. We wish also to record our appreciation of the assistance that we have received from our Member-Secretary, Dr. S. B. L. Nigam, both in the course of the enquiry and in drafting the report.

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CHAPTER II

REQUIREMENTS OF RAW JUTE AND MESTA

2.1. Requirements during the First Plan Period.—The industrial consumption of raw jute is largely dependent on the export demand for jute goods which, in turn, is governed by a number of conflicting factors. While in recent years the jute goods market has expanded appreciably, the variations in the industrial consumption of raw jute have been none too less wide. As a result of the Korean War in 1950 the demand for raw jute and jute goods increased considerably and the consumption of raw jute and mesta by mills in India during the first year of the First Plan-1951-52 amounted to about 61 lakh bales as against 56 lakh bales in the preceding year. This level of consumption could not, however, be maintained and with the disappearance of the Korean boom, the consumption of jute and mesta by mills dropped to about 57 lakh bales in 1952-53 and to about 55 lakh bales in 1953-54. The unsealing of looms and increase in the working hours of the mills from 42½ to 48 in 1954, however, resulted in an increase of jute goods production and the consumption of jute and mesta by mills increased significantly to about 63 lakh bales in 1954-55 and to more than 68 lakh bales in 1955-56. The following table brings out the total consumption of raw jute and mesta during the First Plan period:—

TABLE NO. I

Consumption of Jute and Mesta

(Lakh bales)

	I.J.M.A Mills (a)	Non-I.J.M.A. Mills (b)	Total Mills consumption	Village consumption (c)	Total consumption	Variations in stocks of Jute and mesta with Mills	Total requirements
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1951-52 . . .	55·81	4·99	60·80	1·00	61·80	+0·62	62·42
1952-53 . . .	52·01	4·46	56·47	1·20	57·67	+4·10	61·77
1953-54 . . .	50·55	4·33	54·88	1·50	56·38	—1·77	54·61
1954-55 . . .	57·51	5·12	62·63	1·90	64·53	—2·66	61·87
1955-56 . . .	62·92	5·25	68·17	2·30	70·47	+0·49	70·96

(a) Excluding figures of Gagalbhai, Kedarnath, Bharat and Nafar Chandra Jute mills.

(b) Based on returns received by I.C.J.C.

(c) Estimated.

2.2. It will thus be observed that the total requirements of jute and mesta during the First Plan period varied rather widely. During the first two years the mills' requirement remained stable but in the subsequent year, 1953-54, it slumped by about 12 per cent. During the last two years of the Plan period, however, the jute goods market broadened considerably and the requirement of jute and mesta increased rapidly to about 71 lakh bales at the end of 1955-56. On the whole, the consumption requirements of raw jute and mesta increased by about 14 per cent. during the First Plan period.

2.3. Requirements during the Second Plan Period.—In the present international situation it is rather difficult to estimate, with any precision, the external demand for jute goods during the Second Plan period. It is said that the jute goods are not being used quite as rapidly as they are being manufactured as the production and trade of those agricultural commodities, which are traditionally packaged in jute, has increased less markedly than that of other agricultural commodities.[1] Although the world trade in jute manufactures during the early post-war period has generally been much smaller than before the War, during the last few years it is catching up at a rather rapid rate. Final figures of world exports of jute manufactures for 1955-56 are not available, but there are indications that they have made significant advance over the previous years.[2] The world consumption of jute, which gives broadly an idea of the world demand for jute goods, has increased by about 45 per cent. over the last 10 years, *i.e.* from 84 lakh bales in 1946-47 to about 121·4 lakh bales in 1955-56.

2.4. World Demand for Jute Goods.—The various jute interests, particularly representatives of the IJMA and the Jute Fabric Shippers Association, whom we interviewed in Calcutta, feel that there is every reason to expect that the world demand for jute goods will continue to increase during the Second Plan period. Some of the representatives were rather very optimistic and hoped that with the increase in agricultural production in the world, the demand for packaging material will increase much more than what it had been during the last few years. The trade also seems to be quite confident that jute will be able to maintain, by and large, its position against other packaging substitutes. They feel that it will not be too optimistic to assume that during the next five years the world export demand for jute goods will go up by about 15 to 20 per cent. over that of 1955-56. It is interesting to note in this connection that a recent "FAO Survey of Markets, Manufacturing and Production of Jute" estimates that the container requirements of world may be no less than hitherto. It concludes, "With jute production and manufacture more broadly based in recent years, the price of jute container has become more competitive. There are few signs of any change in the price of fibre except in an upward direction and wherever container re-usage is extensive, there are now better prospects of jute retaining markets against the inroads of paper".[3]

2.5. India's Position in World Markets.—India occupies a premier position in the world trade of jute goods; her share in the total exports of jute manufactures during the last several years has been more than 85 per cent. She has also kept pace with the rate of increase in the world trade since 1950-51; the increase being more than 20 per cent. Of late, however, some other countries, particularly Pakistan, Japan and Brazil have started competing with India. The representatives of the Jute Fabric Shippers' Association, Gunny Traders' Association and others, however, feel that Japan and Brazil may not be regarded as our serious competitors, particularly in the case of Sackings in which we have the advantage of lower cost. The threat from Continental and Dundee mills is also not great.

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[1] F.A.O. Commodity Series—Bulletin No. 28, 1957, p. 2.

[2] Ibid p. 3.

[3] F.A.O. Commodity Series—Bulletin No. 28, 1957, op. cit : p.4.

Pakistan must, however, be reckoned as a formidable competitor in the coming years; she has the advantage of cheap and good quality fibre and modern mills. In the case of sensitive and quality conscious markets, *e.g.* U.S.A., Canada, etc., the threat to India's trade, particularly in Hessain, is all the more great since she depends on Pakistan for the supply of good jute for manufacturing special quality Hessian for these markets. On the whole, the world markets have become increasingly competitive and there is little ground to be complacent about our predominant position in world markets. Nevertheless, there is no reason to get unduly alarmed at the situation. The trade is confident, and we agree with them, that India will be able at least to maintain her position during the next five years. At any rate, our share in the world trade may not decrease. Indian market is still the cheapest and an increase of about 15 per cent. in India's export of jute goods by 1960-61 is regarded by practically all the people, whom we interviewed, as a safe assumption.

2.6. Internal Consumption of Jute goods.—The internal consumption of jute goods has also been increasing at a fairly rapid rate. During the First Plan period, the quantities of jute goods cleared for home-consumption by I.J.M.A. mills increased from 146.7 thousand tons to about 190 thousand tons, recording thereby an increase of more than 22 per cent. To this may be added the quantity of jute goods cleared for home-consumption by non-I.J.M.A. mills whose figures are unfortunately not available. The increased production of foodgrains and other agricultural commodities during the Second Plan period would entail a bigger demand for packaging material. The increase in population and rise in the standard of living during the Second Plan period would also result in the expansion of jute requirements both as containers and for house-hold and other non-packaging uses. The trade is, therefore, optimistic about a larger increase in the internal consumption of jute goods during the Second Plan period; most of the representatives of the jute trade felt that the increase in the internal demand would be at least 25 percent. This is a modest estimate and we are inclined to agree with it.

2.7. Total Consumption Requirements in 1960-61.—On the basis of the above assumptions, the total consumption requirements of raw jute and mesta by the end of 1960-61 would roughly be about 80 lakh bales made up as follows:

TABLE NO. 2

Consumption Requirements of Jute and Mesta in 1960-61

[Lakh bales]

	Actual consumption in 1955-56	Estimated Consumption requirements in 1960-61
1. Exports of jute goods (in terms of raw-jute and mesta) .	51·0	59·0
2. Internal Consumption of jute goods (including those cleared by Non-IJMA mills) in terms of raw jute and mesta.	14·5	18·5
3. Village consumption of raw-jute and mesta . .	2·3	2·3
TOTAL	67·8	79·8

2.8. Variations in Stocks and total requirements in 1960-61.—The above figures do not take into account the variations in the stocks of raw jute and jute goods with the mills. The actual requirement of raw jute would, therefore, vary from year to year depending upon the increase or decrease in the stocks of raw jute and jute goods in a particular year over the previous year. Thus, in 1955-56 the stocks of raw jute and jute goods with the mills increased by about 3.1 lakh bales (in terms of raw jute) and the total requirement of raw jute in that year was about 70.9 lakh bales as against the actual consumption of 67.8 lakh bales. The stocks of raw jute with the mills (including non-I.J.M.A. mills) at the end of 1955-56 were only about 10.9 lakh bales as compared to 13.1 lakh bales in 1953-54 and 14.9 lakh bales in 1952-53. The level of stocks in 1955-56 was, therefore, considerably low and the mills are likely to build up larger stocks during the coming years. We have discussed the question of reasonable stocks to be maintained by the mills in the next chapter and it seems to us that it will be safe for the mills to keep about 3 months' stocks with them, *i.e.* roughly about 15 lakh bales. The working of the jute economy during the current year, 1956-57, has shown that the mills have already increased their stocks of raw jute by about 3 lakh bales over those at the end of the last season. Allowing for the depletion in the stocks of jute goods which has taken place during the current season, the net increase in the stocks of raw jute with the mills would be roughly about 2 to 2.5 lakh bales. The remaining increase of about 2.5 to 3 lakh bales in the stocks of raw jute may either be spread over evenly during the next four years or it may take place at the end of the Second Plan period when the consumption requirements of raw jute will be considerably high. Thus, the actual requirements of raw jute in 1960-61 would be more than 80 lakh bales. We feel that while the actual consumption of raw jute by mills at the end of 1960-61 may be of the order of about 80 lakh bales, the requirements of raw jute in that year, allowing for the increase in the stocks of raw jute and jute goods, would be nearer 82 lakh bales.

2.9. Village Consumption.—In working out the above figures we have assumed an increase of 15 per cent. in the exports of jute goods and 25 per cent. in the internal consumption over the next five years. The village consumption at 2.3 lakh bales has, however, been taken as constant during the next five years[1]. It is not unlikely that with the increase in rural agricultural and industrial activities, village consumption of raw jute may go up and our estimate of the overall requirements of raw jute of about 82 lakh bales in 1960-61 may prove an under-estimate. Since, however, export demand for jute goods is unpredictable and subject to wide fluctuations, we feel that variations in the village consumption may be offset to some extent by variations in the assumed order of the export demand. In any case, it is perhaps better to err on the conservative side in this matter, specially as we have the Cushion of imports of raw jute from Pakistan to fall back upon. We do realise, however, that in some years the export demand may not increase as much as we have assumed and the internal consumption of raw jute may lag behind and may not show the increase assumed. It is, therefore, also likely that the actual requirements may be below 82 lakh bales. On the whole, however, we feel that the present indications are that the demand for jute goods will go up and our estimated overall requirements of 82 lakh bales of raw jute at the end of 1960-61 may not be much wide off the mark.

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[1] We have taken the current village consumption as 2·3 lakh bales, which is also assumed by I.J.M.A. The I.C.J.C, however estimates it at only 1·5 lakh bales. The estimate of 1·5 lakh bales is being used for a number of years and we think that with the increase in agricultural production in recent years and increased activity in the rural sector, the village consumption of raw jute and mesta would have also increased. It would , therefore, be more correct to adopt I.J.M.A.'s revised estimate of 2·3 lakh bales.

2.10. Capacity of Industry to consume 80 lakh bales.—We should mention here, however, that while the I.J.M.A. agreed on the cautious estimate of 80 lakh bales of consumption requirements of raw-jute in 1960-61, some of the representatives of jute dealers and shippers were in favour of a higher estimate of 84 or 85 lakh bales, as they expected a larger increase in our export of jute goods as also internal consumption during the Second Plan period. On the other hand, one or two witnesses expressed some doubts about the capacity of the mill industry to consume even 80 lakh bales of jute and mesta. As a result of our discussions with representatives of the Indian Jute Mills Association and other experts we do not share this doubt about the capacity of our mill industry. With only 48 hours working in a week and a certain percentage of looms sealed, the industry consumed about 68 lakh bales of jute in 1955-56. If all the looms are unsealed and working hours are increased the industry can utilise, without much difficulty, 80 lakh bales of jute and mesta. Unsealing of looms itself will increase production by 12½ per cent. The present programme of modernisation of the mill industry is also bound to increase, to a certain extent, the consumption demand for raw jute. If necessary, a system of multiple shift working could be also resorted to. The real problem is not the capacity of the industry to consume 80 lakh bales of raw jute and mesta but whether there will be demand, both foreign and internal, for that much of jute goods, and once this is assured, we have no doubt the mills will be able to consume 80 lakh bales of raw jute, if not more.

2.11. Year-wise break-up of requirements.—It is obviously impossible to give a year-wise break-up of the estimated requirements of raw jute and mesta during the Second Plan period. But we understand that even our rough estimates will be helpful in as much as it will give a certain perspective to the problem and we have, therefore, ventured to give below our rough guess of the broad trend in this regard subject to the understanding that actual figures are bound to be very different in view of the great uncertainties which characterise the jute trade:—

TABLE NO. 3

Estimated consumption Requirements of Raw Jute and Mesta during the Second Plan period.

(Lakh bales)

	1956-57	1957-58	1958-59	1959-60	1960-61
Export of jute goods (in terms of raw jute & mesta)	51·0	53·0	55·0	57·0	59·0
Internal consumption of Jute goods (in terms of raw jute & mesta) . . .	16·0	16·5	17·0	17·5	18·5
Village consumption (raw jute & mesta) .	2·3	2·3	2·3	2·3	2·3
TOTAL	69·3	71·8	74·3	76·8	79·8

2.12. Variety-wise requirements of jute and mesta.—Precise information on the variety-wise requirements of jute and mesta for the production of different kinds of jute goods is not available. The Indian Jute Mills' Association supplied us the following rough break-up of the consumption of jute and mesta during 1955-56, on the assumption that the Indian crop amounted to 55 lakh bales:—

TABLE No. 4

Variety-wise consumption of Jute and Mesta during 1955-56

	(Lakh bales)	
1. Indian Crop .		
White Jute (60%)		
Mid. (32%)	10·6	
Bot. (53%)	17·5	
X-Bot (15%)	4·9	33·00
Tossa Jute (20%)		
Mid. (60%)	6·6	
Bot. (40%)	4·4	11·0
Mesta (20%)		
Mid. (10%)	1·1	
Bot. (70%)	7·7	
X-Bot. (20%)	2·2	11·0
TOTAL CROP		55·0
Imports (1955-56 season)		
Imports of Pakistan jute.	8·20	
Imports of Pakistan cuttings	6·50	14·7

2.13. The Association has further stated that on the assumption that Indian crop will increase by 10 per cent. by 1958-59, the variety-wise requirements of mills will in that year be as follows:—

	(lakh bales)
White jute	30·4
Tossa jute	14·2
Mesta	15·9
TOTAL	60·5

2.14. There are two main varieties of jute goods which are being produced by mills in India—Hessian and Sacking. Hessian is the finer product which requires better varieties of jute and mesta while Sacking is the coarser product. According to the information gathered by us from the Indian Jute Mills Association and technical people working in the mills which we visited, the manufacture of Hessian requires or an average about 65% white jute (middles and bottoms), 15% tossa jute (middles) and 20% mesta (middles). The manufacture of Sacking and Other goods, on the other hand, requires about 35% white Jute (bottoms and X-bottoms), 10% tossa jute (bottoms and X-bottoms), 20% mesta (bottoms) and 35% cuttings or mesta (X-bottoms). The requirements of the various types of jute and mesta vary, however, considerably from mill to mill and are different for Warp yarn and Weft yarn. The above estimates are, therefore, no more than a very rough and general indication of the use of various varieties of the fibre. The proportion of Hessian out of the total production of jute goods is roughly 40%, while Sacking and other goods account for the remaining 60%. The use of mesta in the manufacture of jute goods is increasing every day. Even in the case of goods meant for American and some of the other fastidious markets, mesta is being mixed now-a-days with jute to a fairly large extent. The break-up of the requirement of the fibre in 1958-59 furnished to us by the Indian Jute Mills Association also reveals that the proportion of mesta to the total consumption is expected to increase from 20% as at present to more than 26%. We feel, therefore, that the rough break-up of the future requirements of different varieties of the fibre may be taken as 50% white jute, 25% mesta, 15% tossa jute and 10% cuttings. On this basis the consumption requirements of the different varieties of jute during the Second Plan period may be roughly estimated as follows:—

TABLE NO. 5

Variety-wise Consumption Requirements of Raw Jute & Mesta

(Lakh bales)

	1956-57	1957-58	1958-59	1959-60	1960-61
1. White jute	34·6	35·9	37·0	38·4	40·0
2. Tossa jute	10·5	10·7	11·1	11·5	11·8
3. Cuttings	6·9	7·2	7·4	7·7	8·0
4. Mesta	17·3	18·0	19·8	18·2	20·0
TOTAL	69·3	71·8	74·3	76·8	79·8

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2.15. It may be mentioned that in the above calculations, requirements for variations in stocks have not been taken into account. As we have mentioned earlier, the stocks of raw jute with the mills are likely to go up during the Second Plan period and the overall requirements by the end of 1960-61 may be of the order of about 82 lakh bales. The variety-wise requirements of raw jute for stock purposes may be assumed to be of the same proportion as has been worked out above for consumption purposes.

2.16. Grade-wise Requirements of Raw-Jute.—A further break-up of these varieites into top, middle, bottom and X-bottom would be of little help for crop planning purposes. These are different grades of a particular variety of the fibre, which, in turn, depend partly on the retting facilities available in an area and partly on the skill used in extracting the fibre. In the absence of any reliable information in this respect, the information furnished by the Indian Jute Mills Association, as given in Table No. IV, which was confirmed by other representatives of the trade, may be taken as a rough break-up of the requirements of each variety of fibre, namely white jute tossa jute and mesta. On the whole, it may be assumed that the requirements of the various grades of the fibre during the Second Plan period would be about 34% middles, 54% bottoms and 12% X-bottoms.

2.17. The production of tops in India is very small (about 2%), and has been included in middles in the above break-up. It may be mentioned here that this is a rough break-up of the likely requirements of the various grades of jute and mesta during the Second Plan period. The actual requirements would of course depend on the nature of the export demand for jute goods. Thus, if the demand for Hessian increases relatively more for US markets, the requirements of middle grades of white and tossa jute would be more than those of other grades and *vice-versa.*

2.18. Requirement of Superior Jat Variety of Jute.—The most sensitive and quality conscious markets are those of United States and Canada and it is here that the danger to India's trade is the greatest from the growing competition of Pakistan which is producing superior varieties of jute. Our market for special bright Hessian in the U.S.A., in particular, is very vulnerable as at present India is not producing the superior jat variety of jute required for it in any appreciable quantity and consequently, she has to depend for its supply largely on Pakistan. While a small quantity of superior white jat variety of jute is being produced in Lower Assam and Tripura, we are short to the extent of about 50,000 to 100,000 bales of this variety of jute and unless special efforts are made to encourage its production in India, we will have either to continue to depend on Pakistan or, as may happen, in the long run lose our market for special bright Hessian. We were told, however, that there are a few areas in Lower Assam and Tripura where production of this variety of jute can be increased if a special effort is made and sufficient inducement provided. We have dealt with this problem in detail in the next chapter.

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CHAPTER III

AVAILABILITY OF RAW JUTE AND MESTA

3.1. Availability during the First Plan Period.—The vicissitudes regarding the supply of raw jute, which followed the partition of India, have had far-reaching effects on the jute economy of the country. As a result of the partition, most of the areas, accounting for about 3/4ths of the production of best quality jute in the State of Bengal, which in itself grew more than 80% of the total jute in the country, passed to Pakistan while the entire mill industry remained concentrated in India. Thus, on the eve of the partition, areas under Indian Union grew only about 16.58 lakh bales of jute as against the mill requirements of about 60 to 65 lakh bales of raw jute and its substitutes. India thus became dependent for her raw jute supplies on Pakistan. A common jute policy with Pakistan could not be worked and the non-devaluation of currency by her in 1949 added to the gravity of the situation. The Government of India, therefore, undertook measures for increasing the internal production of raw jute which were later merged with the Integrated Production Programme launched in 1950-51. As a result, the production of jute in the country increased significantly from 16.58 lakh bales in 1947-48 to 20.55 lakh bales in 1948-49. The lifting of price control on raw jute and jute goods early in 1951, further provided a stimulus to jute cultivators and the production in 1951-52 reached the unprecedented level of 46.78 lakh bales. This tempo could not, however, be maintained and production fell to 45.9 lakh bales in 1952-53, 30.9 lakh bales in 1953-54 and touched as low as 29.3 lakh bales in 1954-55. This sharp decline was reported to be mainly due to the low prices of raw jute at the sowing time and the unfavourable weather conditions. The position, however, improved subsequently and the production went up to 42 lakh bales in 1955-56.

3.2. Owing to a unique coincidence of climatic and agronomic conditions, West Bengal occupies a predominant place in the production of jute. In 1955-56 it accounted for about 50% of the total production in the country. Assam, Bihar, Orissa and Tripura followed and accounted for about 29%, 12%, 6%, and 1.2% respectively of the total production in 1955-56. In recent years, Utter Pradesh has also started growing some jute. The State-wise production of jute and mesta during the past few years is indicated in the following table.

TABLE No. 6

(*State-wise Production of Jute and Mesta*)

(Thousand bales of 400 lbs. each)

State	1947-48*		1948-49*		1949-50		1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesta	Jute	Mesat
Andhra Pradesh	..	..	..	..	..	..	..	..	..	..	..	394	..	292	..	326	..	270	..	261
Assam	536	..	599	..	717	..	790	..	840	..	912	8	902	9	750	4	1,212	9	1,049	11
Bihar	403	..	457	..	665	..	616	..	898	..	820	26	410	16	374	40	512	35*	1,380	105*
Bombay	..	..	..	..	..	..	..	..	..	..	..	83	..	146	..	98	..	109	..	165
Madhya Pradesh	..	..	..	..	..	..	..	..	..	..	..	26	..	21	..	25	..	21	..	19
Madras	..	..	..	..	..	..	..	..	..	..	..	3	..	7	..	2	..	2	..	2
Mysore.	..	..	..	..	..	..	..	..	..	..	..	39	..	87	..	49	..	54	..	55
Orssa.	44	..	65	..	147	..	242	..	387	..	256	50	129	34	192	41	245	45	183	50
Punjab	..	..	..	..	..	..	..	..	..	..	..	2	..	2	..	2	..	2	..	2
U.P.	..	..	..	..	24	..	49	..	103	..	124	..	56	..	70	..	89	..	89	..
West Bengal	649	..	907	..	1,510	..	1,538	..	2,389	..	2,422	51	1,556	36	1,496	431	2,089	612*	1,462	804*
Tripura	26	..	27	..	26	..	48	..	61	..	58	..	38	..	46	..	50	..	58	..
TOTAL	1,658	..	2,055	..	3,089	..	3,283	..	4,678	..	4,592	682	3,091	650	2,928	1,018	4,197	1,159	4,221	1,474
TOTAL JUTE & MESTA	(1,658)		(2,055)		(3,089)		(3,283)		(4,678)		(5,274)		(3,741)		(3,946)		(5,356)		(5,695)	

NOTE—Figures relate to re-organised States.

* Relate to set-up of States existing before re-organisation.

3.3. Despite the significant increase in the production of jute and mesta since partition, the country has remained deficient in the supply of jute to the extent of about 14 to 15 lakh bales which are imported from Pakistan. The over-all supply position during the First Five Year Plan period was thus as follows:—

TABLE NO. 7

Supply Position of Raw Jute and Mesta during the First Plan Period

(In lakh bales of 400 lbs. each)

	1951-52	1952-53	1953-54	1954-55	1955-56
1. Production of jute	46·78	45·92	30·91	29·28	41·97
2. Production of mesta	..	6·82	6·50	10·18	11·59
3. Imports of jute from Pakistan .	18·30	13·25	14·82	12·46	14·70
TOTAL	65·08	65·99	52·23	51·92	68·26

3.4. Besides the imports as shown in the above table, some jute has been available from other sources which is estimated by the trade at 2 lakh bales.

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3.5. Availability during the Second Plan Period.—The target of production of jute during the Second Plan period has recently been revised from 50 lakh bales to 55.4 lakh bales. No target for mesta production has, however, been laid down. Judging from the rate at which mesta production has been increasing in recent years and its heavy demand by mills, it is very likely that the production will increase significantly during the Second Plan period. This is supported by the fact that even in 1956-57, the first year of the Second Plan, mesta production has gone up from 11.59 lakh bales in 1955-56 to 14.74 lakh bales which shows an increase of more than 27%. We feel, therefore, that mesta production in 1960-61 could easily be reckoned at 20 lakh bales.

3.6. Year-wise Availability of Jute and Mesta.—The year-wise break-up of the target of jute has not so far been worked out. To be fairly correct, it has to be estimated in the light of the State Governments' development programmes, reliable information about which is unfortunately not yet available. For our purpose, therefore, we could do nothing better than to make a rough estimate, as shown in the following table, of the likely production during each year of the Second Plan period which is subject, of course, to the same reservation as mentioned in the previous chapter:—

TABLE NO. 8

Year-wise break-up of Jute and Mesta during the Second Plan period

(lakh bales of 400 lbs. each)

	1956-57	1957-58	1958-59	1959-60	1960-61
Jute	42·2	44·0	48·0	51·5	55·4
Mesta	14·7	16·0	17·5	19·0	20·0
TOTAL	56·9	60·0	65·5	70·5	75·4

3.7. Variety-wise Production.—Practically no data are available regarding the variety-wise production of jute in the country. The absence of any scientific standardisation and grading of the various varieties of jute is largely responsible for the paucity of information in this respect. The trade, however, classifies and grades jute fibre in different ways. Broadly, jute is classified into two distinct botanical varieties, *C. Capsularis* and *C. Olitorious,* which are commonly called as White jute and Tossa jute respectively. These two varieties of jute are further sub-divided into top, middle, bottom and X-bottom grades depending upon factors such as strength, colour percentage of cuttings, etc. Another classification of jute is based on its technical characteristics according to which jute may be of Jat, District, Northern, Western, Assam, Orissa, Jungli and Mesta varieties. The Jat variety is the best type of jute generally used for the manufacture of special bright Hessian. Each of the above varieties is further sub-divided into four grades, *viz.*, top, middle, bottom and X-bottom.

3.8. Most of the States have so far not been collecting information regarding variety-wise production of jute on a regular basis. The tentative information* received from the State Governments shows that of the total production of jute (excluding mesta), roughly about 70% is white jute and 30% is tossa jute. On the other hand, some knowledgeable jute dealers and traders estimate that of the total Indian jute crop, about 75% is white jute and the rest is tossa jute. It may be that the estimate of the trade errs a little on the high side in as much as they may include some jute other than normal imports from Pakistan and exclude some Indian jute that is consumed in the villages from their calculations. Though the figures furnished by the State Governments are admittedly of a very tentative nature we would rather like to err on the safe side and adopt them for the purpose of calculating deficiency in our supply of the two varieties of jute.

3.9. Demand and Supply Position during the Second Plan Period.—Assuming that the variety-wise break-up, suggested above, represents a reasonable estimate of the Indian crop and that this pattern would continue in future also, the demand and supply position of white jute, tossa jute and mesta during the Second Plan period would be somewhat as on next page, other things remaining the same.

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*Appendix B-III.

TABLE No. 9

Demand and Supply Position of Raw Jute during the Second Five Year Plan period

(Lakh bales of 400 lbs. each)

	1956-57			1957-58			1958-59			1959-60			1960-61		
	Internal supply	Consumption requirements	Deficiency	Internal supply	Consumption requirements	Deficiency	Internal supply	Consumption requirements	Deficiency	Internal supply	Consumption requirements	Deficiency	Internal supply	Consumption requirements	Deficiency
1. White Jute . .	29·7	34·6	4·9	31·2	35·9	4·7	33·6	37·0	3·4	36·1	38·4	2·3	38·8	40·0	1·2
2. Tossa Jute & Cuttings	12·5	17·4	4·9	13·3	17·9	4·6	14·4	18·5	4·1	15·4	19·2	3·8	16·6	19·8	3·2
3. Mesta	14·7	17·3	2·6	16·0	18·0	2·0	17·5	18·8	1·3	19·0	19·2	0·2	20·0	20·0	..
TOTAL . .	56·9	69·3	12·4	60·5	71·8	11·3	65·5	74·3	8·8	70·5	76·8	6·3	75·4	79·8	4·4

We would, however, emphasize that these are only notional estimates and the actual figures in any particular year are likely to be substantially different depending on weather conditions, prices, etc.

3.10. Variation in Stocks of Raw Jute.—The deficiency of raw jute worked out in the above table does not take into account the requirements of raw jute for purposes of variations in stocks of raw jute with mills. As we have mentioned in the previous chapter, the stocks of raw jute during the Second Plan period are likely to go up by about 5 lakh bales as compared to those at the end of the First Plan period when they stood at a low figure of about 10.9 lakh bales. On the assumption that the increase in the stocks of raw jute will be spread over a number of years during the Second Plan period, we have taken the overall requirements of raw jute at the end of 1960-61 at 82 lakh bales as against 80 lakh bales required for actual consumption purposes. The total deficiency of raw jute at the end of 1960-61 may thus be about 6.4 lakh bales instead of 4.4 lakh bales as shown in the above table.

3.11. Deficiency of Raw Jute and Mesta.—It will be seen from the above table that, other things remaining the same, the consumption demand for fibre may be assumed to exceed its internal supply by more than 12 lakh bales in 1956-57, 11 lakh bales in 1957-58, 8 lakh bales in 1958-59, 6 lakh bales in 1959-60 and 4 lakh bales in 1960-61. The consumption requirements of cuttings have been included under tossa jute in the above table and the deficiency indicated under this head is mainly of cuttings which may be either of tossa jute or of white jute. The main deficiency during the Second Plan period will thus be in respect of white jute and cuttings. Cuttings are actually the cut-pieces of the various varieties of jute—white, tossa, jat, northern, etc., and are a bye-product of pucca baling of raw jute for export markets. They are used in the production of both Hessian and Sackings for giving strength to the finished product. We are told that mesta is proving to be a good substitute of cuttings specially in mills which have installed modern machinery and if our production of mesta increases, the need for import of cuttings is likely to go down considerably.

3.12. Grade-wise Production of Raw Jute and Mesta.—The break-up of the production of white jute or tossa jute or mesta into different grades, *viz.*, tops, middles, bottoms and X-bottoms is not available.[1] Since almost the entire internal production is consumed by the mill industry, we can only assume that the production of the different grades would be of the same order as their consumption by the mills. The deficiency of these different grades would in that case be indicated by their imports from Pakistan. We understand from the trade that of the white jute imported from Pakistan, about 25 per cent. is of middle grade, 60 per cent. of bottom grade and 15 per cent. of X-bottom grade. Cuttings imported from Pakistan are largely of white jute—about 80 per cent—while tossa jute cuttings account for about 20 per cent. It is said that the bottom grade of Pakistan jute is comparable with the middle grade of Indian jute while middle grade jute of Pakistan is superior than our middle grade. Thus our basic deficiency is in respect of better grades of white jute, *viz.*, tops and middles. In our output of white jute the percentage of bottom and X-bottom grades is relatively high and the mere increase in the production of white jute will not solve the problem of deficiency. What is, therefore, needed is an increase in the production of top and middle grades of white jute.

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[1] Some *ad hoc* information collected by Indian Central Jute Committee is given in Appendix B.—IV.

3.13. The fact that the country can produce almost all the good qualities of jute required for maintaining our competitive position in the world markets is not at all disputed. Even as back as 1953, the Expert Committee on Quality of Jute which examined this question in detail stated emphatically that "the popular belief that India cannot grow jute of good quality is erroneous". It is likely, however, that for producing special bright Hessian for U.S. markets we may have to remain dependent on Pakistan for jat variety of white jute to the extent of about 50,000 to 1,00,000 bales. Even for the manufacture of this special variety of Hessian we understand that the jute grown in Tripura (known as Agartala jute), Dhubri, Goalpara and Mankatchar areas in lower Assam, Mathabhanga, Dinhatta, Haldibari and Belakoba areas in West Bengal is quite suitable provided the colour of jute grown in these areas is improved.

3.14. It is necessary to note here that in estimating the likely deficiency in the internal supplies of production of jute and mesta during the Second Plan period we have assumed that the year-wise targets of jute and mesta mentioned above will be achieved. To the extent that does not materialise our dependence on imports will correspondingly increase. In fact it is likely that in 1957-58 itself our actual import requirements may be substantially different from the estimates given above. The consumption requirements estimated by us are not very optimistic and though some unforeseen and abnormal factors may cause a decline in the world demand for jute goods, the present indications are that the world consumption of jute will expand in future and this is the time for us to catch up with it and strengthen our competitive position in the world markets.

3.15. Self-sufficiency.—The deficiency in the supply of raw jute during the Second Plan period can be made good either by increasing the production of jute and mesta in the country or by imports from Pakistan. For various reasons, it does not seem advisable to continue to rely to any large extent on imports from Pakistan. With restrictions on jute acreage and the price policy now being followed in Pakistan, imports of jute into India from that country are becoming costlier every day and our continued dependence on her will sooner than later weaken seriously our competitive position in the world markets. The trade also feels that it would be very desirable for India to become self-sufficient in jute as early as possible. We have also seen that with the exception of a small quantity of jat variety of white jute, the country is producing or can produce all the varieties of jute needed for the manufacture of jute goods. That today the quality of our jute is not superior and most of it is of bottom or of X-bottom grades is largely due to the fact that retting water facilities are not adequate and our cultivators in many areas are not so skilled as the Pakistani cultivators are. We have been told by the representatives of the trade that wherever displaced jute cultivators from Pakistan have settled, the quality of fibre has improved tremendously. The skill of the cultivators and the retting water facilities available play, therefore, a very important part in determining the quality of jute.

3.16. Production of Raw Jute.—To be self-sufficient in the supply of jute, it is necessary that the internal production should be increased much more than what has been envisaged in the Second Five Year Plan and that the additional production should be primarily of superior grades of white jute. As estimated by us above, the deficiency in 1957-58, other things remaining the same, is likely to be of the order of about 11 lakh bales and even in 1960-61 the country will remain deficient to the extent of about 6 lakh bales (including requirements for stock purposes) if the present target of jute production is fully achieved and mesta production goes up from 14.7 lakh bales as at present to 20 lakh bales.

3.17. The target of jute production has recently been raised from 50 lakh bales to 55.4 lakh bales. This has been done after full deliberations with the State Governments concerned and with full realisation of the urgent need for stepping up internal production. There may, therefore. be little scope for this target being further revised upward. We have, therefore, to look mainly to the substitute of jute, *i.e.*, mesta. We have examined in greater detail the problem of mesta production in another chapter.

3.18. Classification of jute-growing areas.—In so far as the production of jute is concerned, we have to try our best to achieve the planned target of 55.4 lakh bales and ensure that as large a proportion as possible of this quality jute, especially white jute of superior grades. It was not possible for us to make any comprehensive survey of the areas where good quality jute, in which we are deficient, is being grown at present in the various States and/or where possibilities exist for an increase in its production. We have, however, ascertained, tentatively from the various jute interests, jute brokers, millowners, traders, etc., some of the areas which produce good quality jute and where further efforts may be concentrated. These may roughly be classified into two categories; those where natural supply of slow flowing good retting water is available and those where the fibre grown is good and strong but the absence of sufficient retting water facilities spoils the colour and quality of the fibre. An illustrative list of such areas is given below, while a more comprehensive list is given in Appendix A-VI.

TABLE No. 10

Areas Growing Good Quality White Jute

State	*District*	*Centre*
(a) AREAS WHERE NATURAL SUPPLY OF GOOD RETTING WATER IS AVAILABLE.		
West Bengal	Nadia 24-Parganas Burdwan Birbhum.	Areas which are commanded by D.V.C. and Mayurakshi Projects. The water of the canals of these projects can be utilised for retting purposes.
Bihar	Purnea	Kishanganj Forbesganj
U.P.	Sitapur Bahraich Deoria	Running water for retting available in about 40% of the areas in these districts.
Assam	Goalpara Nowgong Kamrup Darrang	In these districts about 60% of the areas are benefited by river water.
	Lakhimpur Sibsagar	In 75%, areas of these districts there are plenty of sources of water for retting purposes.
	Garo & Mikir Hills	Areas in these hills are producing good quality jute as they get the advantage of running water from springs.

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State	*Districts*	*Centre*
	(b) AREAS WHERE FIBRE GROWN IS STRONG AND GOOD BUT RETTING WATER FACILITIES ARE LACKING AND HENCE THE COLOUR IS NOT GOOD.	
West Bengal	Jalpaiguri	Kotowali Raiganj Maynaguri Mal Junction Metali Nagarkat Dhupguri.
	Darjeeling	Siliguri Phansideva Kharibari
	Cooch Behar ,	Sadar Dinhatta Mathbhanga Mekliganj Tufanganj
	West Dinajpore	Balurghat, Hilli, Kaliyaganj, Raiganj Bansihari Kushmandi, Hemtapad Itahar, Gangarampur Tapan, Kumarganj
	Malda	Gazole Harishchandrapur Habibpur Bamongola
	24—Parganas	Bishnupur Bhangore Amdanga
Bihar	Santhal Parganas	Sahibganj Bhowanipur Pakur Janakinagar Chhatapur
	Champaran	Motihari
	Muzaffarpur	Motipur
	Darbhanga	Khajauli Toki Tamuria Hainagar Hanumangarh.
U.P.	Kheri Barabanki Ballia Azamgarh Basti Bijnor Nainital Faizabad	
Assam	Some of the areas in the districts mentioned in category (a) above do not get sufficient water and if retting tanks are provided in these areas, the yield is likely to go up considerably.	
Orissa.	Cuttack	Kendrapara, Pattnmundei, Patkura, Salepur, Mahanga, Kesannagar, Badchana, Dharamsala.
	Balasore	
	Keonjhar	Anandpur Sub-Division
Tripura		Agartala Karimganj Khowai Ladia.

3.19. We would like to emphasise that the above list is by no means exhaustive. A detailed list can only be worked out by the State Governments concerned, and we would suggest that such a classification of areas should be made by the State Governments as early as possible so that the jute development programme may be planned and executed on proper lines. In areas where natural supply of slow flowing good retting water is available, attempts of the State Governments should be directed towards supplying better seeds, fertilizers and adoption of improved techniques such as line sowing, wheel-hoeing, better retting techniques, etc. The underlying object should be to improve the yield per acre in these areas as well as to improve the colour and quality of jute by training the cultivators in better retting techniques. It would be useful if a number of skilled displaced jute growers who, it is said, know better retting techniques are recruited by State Governments and posted in such areas to give demonstration of better jute growing and jute retting techniques to the local people.

3.20. Areas served by Canals of D.V.C. and Mayurakshi Projects.—Our attention has also been drawn to the possibility of growing jute in the neighbourhood of canals in Damodar Valley Corporation commanded areas and in Mayurakshi Project areas. Experiments carried out by the Jute Agricultural Research Institute of the Indian Central Jute Committee have shown that white jute *C. Capsularis,* as an earlier additional crop, can be fitted well in double cropping programme with transplanted paddy in the D.V.C. areas. If timely irrigation is made available, it is possible to cultivate jute as the first crop in at least 20% of the area under the Kharif crop in the D.V.C. commanded zone, *i.e.* the total acreage under jute (double cropped) can be increased from the existing 1 lakh acres to about 2 lakh acres. The possibilities of increasing acreage in these areas are more bright in the districts of Burdwan, Hooghly and Howrah. Similarly, in the Mayurakshi Project areas if adequate amount of irrigation water is made available from April to July, it is estimated, that the jute acreage can be increased considerably in Murshidabad, Burdwan and Birbhum districts. The slow flowing water of the canals in these areas should be useful for retting at a period when it would not be ordinarily required for irrigation of other crops.

3.21. Provision of Retting Tanks.—In the areas of second category, *viz.,* those where good and strong fibre is being grown but the quality and colour is not good because of lack of good retting water, the primary work should be to renovate the existing retting tanks as well as to dig more tanks. We are convinced that the provision of good retting water facilities will alone improve the colour and quality of jute and while better seeds, fertilizers, etc., may be supplied in these areas, the problem of our dependence on Pakistan for better grades of white jute will not be solved unless the basic facility of abundant retting water is provided.

3.22. In this connection we were told that though the districts growing white jute in West Bengal receive rainfall of over 100 inches in a year, scarcity of retting water at the time of harvest is felt due to seapage and other factors. Provision of retting pools in these districts will, therefore, considerably contribute to the improvement in the quality of jute. In the districts of Nadia and 24-Parganas, it is generally found that at the time of harvest of early sown white jute, retting tanks do not contain enough water but when mesta or late sown jute is harvested, over-flow from river waters is found to sub-merge the way-side ditches. This explains mainly the reason why the colour of mesta in some of the areas in these districts is better than that of jute. The quality, quantity and availability of retting water are thus essential requirements for production of good jute.

3.23. Weather Conditions.—Whether conditions, particularly the number and duration of pre-monsoon showers, also influence the quality and quantity of raw jute. If rains do not take place in May, the cultivators, who would have otherwise grown a crop of white jute *C. Capsularis,* usually divert their land to Tossa *C. Olitorious.* If the rains are further delayed, the cultivators have of necessity to grow a crop of mesta or divert the land to other crops.

3.24. Improvement of Water in Retting Tanks.—We were also told that the water in the retting tanks gets spoilt after some jute has been steeped into it and subsequent steepings affect the colour and quality of jute. It is desirable that the Indian Central Jute Committee should conduct some research in this matter and find out some chemical, biological or other process for improving the quality of the water in tanks.

3.25. Soil Survey.—As in the case of areas in the first category, the increase in the overall production of jute in the areas of the second category will also have to be achieved largely by increasing the yield per acre as the prospects of bringing in more area under jute without affecting the production of paddy are limited. Intensive cultivation in these areas through the adoption of improved seeds, application of fertilizers, imporved cultural practices, adoption of plant protection measures, etc., would go a long way in increasing the production of good quality jute. We would, therefore, urge that a detailed survey of the jute growing areas should be undertaken by each State Government and the jute production programme should be planned in a rationalised manner. The Soil Survey recommended by the Expert Committee on the quality of jute, if and when completed by the States, would also be of considerable help in the proper planning of the jute development programme. We regret to note that progress in this regard has been very slow so far and should be expedited.

3.26. Extensive Cultivation.—There are also some possibilities of bringing in more area under cultivation of jute without causing any detrimental effect on the production of paddy. In Assam, for instance, we understand that, with appropriate drive, about 45,000 acres more can be put under jute cultivation. Assam produces good quality jute and the yield per acre is also the highest. It is, therefore, highly desirable that an all-out drive should be made by the Government of Assam to increase the production of jute both by extensive and intensive methods of cultivation. Orissa and U.P. also offer some possibility of extensive cultivation. Certain districts in U.P., *e.g.*, Bareilly, Lakhimpur-Kheri, Mirzapur, Gorakhpur etc. are growing good white jute and it is worthwhile examining whether some more lands in these Districts can be put to jute cultivation. Again, in Orissa, the jute grown in Cuttack and Sambalpur areas is strong, though the colour is dark, and if possible, more lands in these areas may be brought under jute cultivation.

3.27. Intensive Cultivation.—The urgency of the situation, however, demands that, in the first instance, effort should be concentrated in those areas where good quality white jute is being grown at present and/or where it can be grown or its production can be further increased either by the provision of better seeds, fertilizers, improved cultural practices, etc., or by providing sufficient good retting water facilities. A planned and rational jute development programme would along and the dependence of the country on imports from a precarious source of supply.

3.28. There are, however, limitations to increasing internal production of jute and mesta. At any rate, self-sufficiency cannot be achieved in a year or two. We would, therefore, have to continue to import jute from Pakistan to the extent our supply falls short of the demand. The import policy to be followed in future, so as to be in the best interest of the country, has been examined by us in the next chapter.

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CHAPTER IV

IMPORTS OF RAW JUTE

4.1. Imports since Partition.—Since Partition, India has been a net importer of raw jute. In the early years following partition, the bulk of Indian mills' requirements had to be met by imports from Pakistan—during the year ending June 1949, the imports amounted to as much as 45 lakh bales. These, however, dwindled to less than half—about 20·6 lakh bales—in the subsequent year owing mainly to the deadlock created by the non-devaluation of currency by Pakistan towards the end of 1949. A special short-term agreement was thereafter entered into between India and Pakistan in February, 1951 which provided for the import of 10 lakh bales of raw jute from Pakistan during the period February 1951 to June 1951. This agreement was further extended upto 31st August 1952. Actual imports during the three-year period ending June 1953 amounted to 25·77, 18·0 and 13·3 lakh bales respectively. Another agreement, for a period of three years, was signed between India and Pakistan in March 1953 under which India was to import annually 18 lakh bales of raw jute with the proviso that, should it become necessary, Pakistan would facilitate exports to India of even larger quantities upto 25 lakh bales. This agreement was again examined in the beginning of this year and a new three years trade agreement between India and Pakistan became effective from 1st February 1957. Raw jute has been included in this agreement as an item for export from Pakistan to India under special arrangements. The quantity of raw jute to be imported will be indicated by the end of September each year.

4.2. Actual imports of raw jute from Pakistan into India since Partition have been as follows:—

TABLE No. 11

Imports of Raw Jute from Pakistan

Year ending June	*Quantity* (Lakh bales)
1948-49	45·0
1949-50	20·6
1950-51	25·8
1951-52	18·3
1952-53	13·3
1953-54	14·8
1954-55	12·5
1955-56	14·7

4.3. It will be observed from the above table that during recent years, imports of raw jute have been of the order of 14 to 15 lakh bales. The maximum quantity imported since Partition was about 45 lakh bales in 1948-49, while the minimum was in 1954-55, when about 12·5 lakh bales were imported. During the current season, 1956-57, however, imports are expected to be even lower; till March 1957 only about 5 lakh bales were imported and according to trade estimates maximum of 3 lakh bales more may be imported by the end of the season. This marked decline in the imports during the current year is said to be due to prohibitive prices of jute and cuttings in Pakistan.

4.4. Besides the imports as indicated above some jute has been available from other sources which is estimated by the trade at 2 lakh bales.

4.5. Variety-wise Imports.—Variety-wise details of imports of raw jute from Pakistan are unfortunately not available. The representatives of the Indian Jute Mills Association, Jute Fabric Shippers' Association and others estimate that of the total imports of about 15 lakh bales, roughly 6 to 7 lakh bales are of cuttings and the balance is of long jute. About 80% of the imported cuttings is of white jute, while the remaining 20% is of tossa jute. Of the long jute imported from Pakistan, about 25% is of middle grade, 60% of bottom grade and 15% of X-bottom grade. According to another estimate the import of cuttings is about 60% of the total imports while the balance is Habijabis (10%) and long jute (30%). These can be no more than rough estimates and in the absence of better source of information these alone can serve as a basis for our comments.

4.6. Import of Long White Jat Jute.—It will thus be seen that imports of jute are, by and large, of those varieties which are already being produced in India. This was also confirmed by all the representatives of the jute trade and mills whom we interviewed. The only quality of jute which the country is not at present producing, and a very small quantity of which is needed for the manufacture of special bright Hessian for U.S. markets, is long white jat variety. It is considered by some that climatically and agronomically it is difficult to produce this special variety of jute in India. On the other hand, some mill-owners and jute dealers feel that the jute grown in some areas in India *e.g.*, Tripura and Haldibari area, compares favourably with jat variety of East Bengal in so far as strength of the fibre is concerned. The colour of Agartala jute is, however, a little darker and if this can be improved by better retting techniques, the requirements of this special fibre needed for producing bright Hessian can also be met internally. The total requirement of this special variety of jute is estimated at about 50 thousand to one lakh bales. The import of other varieties of white jute is not indispensable and our policy should be to restrict their imports to the minimum. This will also encourage indirectly the production of better grades of white jute in the country.

4.7. Import of Cutting.—The import of cuttings is preferred by the Indian mills mainly because they are relatively cheap. Except a small quantity of the cuttings of long white jat variety of jute, all the other types of jute of which cuttings are being now imported, are produced in the country. If our internal production of these varieties of jute increases, there is no reason why we cannot dispense with the imports of cuttings. We were even told that if the internal supplies of mesta are available at the same or at a cheaper price as cuttings from Pakistan, the imports of the latter could be considerably reduced. So long, however, as our supply falls short of the demand, import of cuttings of superior grades of jute would have to be allowed.

4.8. Jute Mills' Purchase Policy.—It is sometimes alleged that jute mills try to keep off the Indian market during the harvesting period in order to take advantage of the low holding power of the cultivators. As the harvesting period in Pakistan commences a little earlier than in India, the Indian jute mills, it is said, often play between the two markets and confine their purchases in the beginning to Pakistan markets where they can buy cheap. We have examined this allegation in another chapter. It appears to us that the figures of monthly purchases of raw jute by the Indian jute mills tend to give some support to this allegation. The bulk of the purchases from Pakistan about 70% of the total purchase—is made during the months of June and November, while the substantial portion of Indian jute crop about 55% to 60% is bought by the mills after November and December. It must be admitted at the same time that a part of this practice is also due to the fact that Pakistan crop comes to the market somewhat earlier than the Indian crop.

4.9. Import Policy to be followed in Future.—The Committee had a frank discussion with the representatives of the mills and the trade on their need for importing jute and the possibility of staggering imports from Pakistan. The gap between the demand and internal supply of raw jute and mesta, allowing for stock variations, as estimated by us in the previous chapter, during the remaining period of the Second Plan, would be about 11 to 12 lakh bales in 1957-58, 9 to 10 lakh bales in 1958-59, 7 to 8 lakh bales in 1959-60 and 6 to 7 lakh bales in 1960-61. Our basic deficiency is of 50 thousand to one lakh bales of jat variety of white jute which is required for the manufacture of special bright Hessian for U.S. markets. Allowing for some other requirements of superior grades of white jute, our total import requirements from Pakistan of long white jute should not be more than 2 lakh bales. Larger imports of this quality may, in fact, be detrimental to our internal production. The balance of the deficiency—which will vary from year to year—may be met by imports of cuttings preferably of superior grades of jute. No other grade of jute should be allowed to be imported. Inferior varieties of jute, in particular, which we are ourselves producing in large quantities, should not be allowed to be imported.

4.10. Staggering of Imports.—Staggering of Imports is necessary to protect the interests of our cultivators. A complete ban on the imports of raw jute from Pakistan upto a particular month is likely to put the jute mills to very great inconvenience and loss. This may also not be practicable under the Indo-Pakistan trade agreement. We feel, however, that a policy of phased or staggered import would go a long way to correct some of the difficulties of the situation. We suggest, therefore, that the issue of import licences should be regulated by the Jute Controller in such a manner that the requisite quantity of long white jute, *viz.* 2 lakh bales, is imported largely during the months of July, August and September. The balance of the total import requirements should be of cuttings which should be broken up into two parts. A small quota of these may be allowed in the beginning upto September. No imports should be allowed thereafter till December when the internal supply position becomes more clear and most of the Indian crop is marketed. The balance of the import quota for cuttings may be allowed to be imported after December.

4.11. The staggering of imports will, in our opinion, be convenient to the trade also because the supply of cuttings in Pakistan in the beginning of the season is limited and it would be more advantageous for them to buy their requirements of cuttings late in the season. The total annual exports of cuttings from Pakistan to all countries is about 10 to 11 lakh bales, of which India accounts for more than 60%. Since India is the largest consumer of Pakistan cuttings and demand from other countries is limited, Indian traders should not lose anything by postponing their purchases to the end of the season.

4.12. Decision about Imports in every Season.—We would further suggest that in future the quantity to be imported from Pakistan should be decided every season by the Ministry of Commerce and Industry in consultation with the Ministry of Food & Agriculture once in July for the interim quota and again in September/October for the final quota, in the light of supply position, while actual imports should be suitably staggered by the Jute Controller. The Jute Controller should ensure that the licences are issued separately for long white jute (of which as large a quantity as possible should be of jat variety) and for cuttings.

4.13. Need for Variety-wise and Grade-wise Classification of data.— The import quota of long jute as well as of cuttings each year will obviously depend on the production of the various varieties of raw jute in the country. In order to enable the Government to make an assessment of the demand and supply position every year, it is very necessary to collect variety-wise and, if possible, grade-wise production figures of jute and mesta on a regular basis. Similarly, the Jute Controller should maintain details of the variety-wise and grade-wise imports of jute and cuttings from Pakistan. The stocks of jute with the mills are at present not being classified according to varieties. We were given to understand, however, that the Indian Jute Mills Association plan to classify their stocks into long jute and cuttings from July this year. We would suggest that the Indian Jute Mills' Association may be requested to classify their stocks as well as purchases according to white jute, tossa jute, mesta and cuttings. If possible, these varieties may further be classified into different grades. The need for variety-wise and grade-wise classification of production, imports, stocks, etc., of jute is great and we can hardly over-emphasise the vital importance of these data for proper planning of production and import programmes.

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CHAPTER V

MESTA

5.1. Varieties of Mesta.—Mesta and Bimli which belong to the Hibiscus family are, by far, the most important jute substitute fibres. These fibres are produced from two cultivated varieties, *viz. Hibiscus Cannabinus* and *Hibiscus Sabdariffa Var Altissima.* In India the fibres of the Hibiscus family are known by different names in different places, *e.g.,* it is called Mesta in West Bengal, Bihar, Orissa, Assam and U.P., Gogu or Bimli in Andhra and Madras, Bombay Hemp in Bombay, Deccan Hemp in Hyderabad, etc. Outside India, a similar fibre, which is being grown as a serious potential rival of jute, is known as *Kenaf.* Of the two varieties, *Hibiscus Cannabinus* is a stronger fibre but is more susceptible to plant diseases while *Hibiscus Sabdariffa,* sometimes known as Rosela, is of inferior strength but it is easier to grow it and it is relatively free from plant diseases.

5.2. Cultivation of Mesta.—The cultivation of mesta has a number of economic advantages over jute, particularly over inferior varieties of jute. Unlike jute it does not require fertile soil for growth and can thrive well even in drier areas. Its cost of cultivation is lower as compared to that of jute, because as against three weedings required for the proper growth of jute, mesta can thrive well even if no weeding is done. It is, therefore often more convenient as well as profitable to the cultivator to grow mesta than an inferior variety of jute.

5.3. Production of Mesta.—Prior to the Devaluation of the Rupee in 1949, India produced only a very small quantity of mesta, most of which was exported to other countries. The consumption of mesta by the Indian mills, however, received stimulus after 1950 and its increasing popularity among mills in recent years is largely due to its cheapness as compared to that of jute. The production of mesta has consequently increased rapidly during the last few years as the following table will reveal:—

TABLE NO. 12

Area and Production of Mesta according to Reorganized States

(Area=000 acres)
(Production=000 bales of 400 lbs. each)

	1952-53		1953-54		1954-55		1955-56†		1956-57*	
	Area	Production	Area	Production	Area	Production	Area	Production	Area	Production
Andhra Pradesh .	237	394	138	292	179	326	123	270	124	261
Assam . .	3	8	3	9	3	4	5	9	5	11

	1952-53		1953-54		1954-55		1955-56†		1956-57*	
	Area	Production	Area	Production	Area	Production	Area	Production	Area	Production
Bihar	26	26	17	16	31	40	24	35	54**	105**
Bombay	85	83	159	146	90	98	114	109	150	165
Madhya Pradesh	46	26	25	21	22	25	25	21	24	19
Madras	2	3	4	7	1	2	1	2	1	2
Mysore	41	39	87	87	39	49	63	54	57	55
Orissa	25	50	17	34	21	41	23	45	25	50
Punjab	1	2	1	2	1	2	1	2	1	2
West Bengal	18	51	12	36	141	431	193	612	297**	804**
TOTAL	484	682	463	650	528	1081	572	1159	738	1474

† Partially revised figures. *Final Estimate.

**Relates to the set-up of States before Re-organisation.

5.4. It will be observed that the production of mesta has increased from about 7 lakh bales in 1952-53 to more than 14 lakh bales in 1956-57. The increase has been more marked in West Bengal where the production has gone up from 51,000 bales in 1952-53 to over 8 lakh bales in 1956-57. Andhra comes next where mesta production in 1956-57 was about 2.6 lakh bales. The other States where mesta is grown are Bombay, Bihar, Mysore and Orissa.

5.5. Problems of Mesta Production.—Our terms of reference required us, "to work out and recommend the proportions in which mesta and jute should be grown, particularly whether and how far the growth of mesta should be encouraged in any specified parts of the country". This question seems to have arisen mainly because some people are apprehensive of the rapid growth of mesta. They argue that if the production of mesta continues unregulated, it may soon replace jute, which would ultimately affect adversely the quality of our jute goods and our competitive position in the world markets. It is maintained by these people that in a competitive market buyers are likely to prefer, in future, pure jute goods instead of mesta—mixed goods and since Pakistan has a virtual monopoly in the relatively low-priced quality jute, India's position would, sooner than later, become vulnerable. We, therefore, addressed ourselves to two main issues, *viz.* (i) whether or not the admixture of mesta with jute in the production of jute goods, in future, will weaken our competitive position in foreign markets and (ii) whether mesta is replacing jute in certain areas and, if so, is it necessary to regulate its production.

5.6. Admixture of Mesta with Jute.—On the first issue we consulted a number of representatives of the jute trade and mills, most of whom were of the view that a judicious admixture of mesta with jute did not affect the quality of the fabric if proper care was taken. We were told that in world markets pure jute Hessian enjoys a premium of hardly ½% over the mesta-mixed Hessian. An important jute mill-owner informed us that in his mill mesta was being mixed to the extent of 80% and they were able to sell their goods even in U.S. markets at the same rate as the pure jute Pakistani goods. In one of the big mills which we visited, and which had modern machinery, mesta was being used to the extent of about 60% in the manufacture of Hessian as well as Sackings. In another mill which we also visited, the consumption of mesta was reported to be about 25%; a larger use of mesta was not possible because of old machinery. The fact that the industry has so far been able to maintain its position in world markets even after mixing such a large percentage of mesta with jute, makes some people confident that there will not be any major set-back in our competitive position because of the use of mesta in the production of jute goods. The trade also feels that it will be able to take care of the foreign demand particularly of the quality-conscious or fastidious markets, and if at any time in future it is found that mesta mixed goods cannot compete with Pakistani pure jute goods, the mills will be able to adjust their production accordingly.

5.7. Mesta-mixed Goods and Foreign Markets.—While we fully realise the dangers of becoming complacent about the actual situation which India may have to face in the near future when Pakistan comes up as a formidable competitor in jute goods, we feel that there is no special reason at present to get alarmed at the admixture of mesta in the production of jute manufactures. Mesta and jute are very much alike in their spinning characteristics, though the admixture may affect slightly the quality of the finished goods. As far as the colour of the manufactures is concerned, mesta gives generally almost as good results as white jute. The proper admixture of mesta with jute, on the other hand, reduces the cost of jute appreciably and in those markets where consumers are more price-conscious than quality-conscious, mesta-mixed goods have certain advantages over goods manufactured from pure jute. We are also inclined to agree with the view that the mill industry will be able to take care of the requirements of the foreign markets and that the question of admixture of mesta with jute, and the extent to which it should be done, should better be left to it. Foreign demands are of varied nature and the industry has full knowledge about the preferences of the foreign buyers. Moreover, the internal consumption of jute goods has been increasing at a rather fast rate and even if it happens that no admixture of mesta with jute is possible for foreign markets, mesta can certainly be utilised for meeting the internal demand for jute goods.

5.8. We would, however, like to avoid giving an impression that the admixture of mesta in any proportion with jute will not be ultimately harmful to our jute trade. Pure jute goods will be always preferred to mesta mixed goods and as far as possible our attempt should be to grow more and more good quality jute. However, as there are limitations to the increase in the production of raw jute, at any rate in the Second Plan period, we feel that the production of mesta in suitable areas and the admixture of mesta in proper proportions may not, at least in the short run. affect our competitive position in the world markets. The present increase in the production of mesta is, therefore, in our opinion, not alarming in States other than West Bengal.

5.9. Quality of Indian Sacking.—There is, however, one point to which we would like to draw attention. Some of the Indian Sacking is said to be inferior in quality and is sold at a small discount in world markets as compared to that of Pakistan. It is in this case that the danger to our competitive position is the greatest. Some of the people we interviewed were of the opinion that the inferior quality of our Sacking may be due to the use of mesta in its production; but, this view was discounted by the majority of the jute traders and millers. They said that the quality of our Sacking is poor because some of the mills use mostly cuttings, habi-jabis, etc., in their production of Sackings. Some of our Sackings also suffer from a number of manufacturing defects, *viz.* lack of uniform weaving, bad seaming and under-weight. It is because of these manufacturing defects and indifferent workmanship rather than the use of mesta, that these Sackings command a relatively lower price in the world market. We understand that the Indian Jute Mills Association is taking good care of the complaints received from the foreign buyers in respect of the manufacturing defects by conveying them to the mill concerned and, if necessary, by removing the name of the defaulting mill from the approved list. We hope, the steps already being taken by the Indian Jute Mills Association are sufficient, but in case they are found wanting, it will be desirable to examine the position and take suitable steps to maintain the reputation of our Sacking in foreign markets.

5.10. Regulation of the Production of Mesta.—Once it is accepted that the proper admixture of mesta is not likely to be detrimental to our foreign trade, the question of regulating its production is automatically answered. The problem before the country at present is to increase as much as possible the total internal availability of the fibre. In estimating the likely deficiency in our supply during the Second Five Year Plan, we have already assumed an increased production of mesta from 12 lakh bales in 1955-56 to 20 lakh bales in 1960-61 and if this is not achieved, our dependence on imports from Pakistan will increase much more. We have pointed out earlier that if the country is to be self-reliant, it is on the production of mesta that we have to depend very largely. Any curtailment or regulation of mesta production in general at this stage would, therefore, not be in the interest of the country's jute economy. On the other hand, it appears to us desirable and necessary to give more attention to the production of mesta than has been done hitherto. The State Governments also need to be informed specifically that the target of jute production fixed under the Second Plan represents only raw jute and not mesta. The production of mesta would be over and above the planned target of jute and hence they should consider the fixing of target for mesta separately.

5.11. Replacement of Jute by Mesta.—This brings us to our second question, *viz.* the replacement of jute by mesta in certain areas. The production of mesta in West Bengal, in particular, has gone up considerably in recent years. It is said that because of the convenience and cheapness of mesta cultivation, more and more jute lands are being brought under mesta. It is, therefore, feared that if the cultivation of mesta in West Bengal continues to increase at the existing rate, jute production in that State may receive a considerable set-back in not too distant a future. Such a suitation, if it happens, would no doubt be undesirable. Although mesta is a useful substitute of low grade jute, good quality jute is always superior and preferable to mesta. The country is already in short supply of good jute, especially of white jute, and it would be unwise if the lands which are at present growing good jute are diverted to mesta production. We, therefore, feel that though there are valid reasons for not discouraging the production of mesta, the additional production should not be at the cost of jute and particularly of white jute. The position, therefore, needs careful examination by each State Government and if it is found in a State that mesta is really replacing good quality jute in certain areas, suitable measures may have to be taken to regulate its production in those areas. In our opinion the problem at present can be said to have assumed some significance only in West Bengal and not in other States.

5.12. Encouragement of Mesta Production.—By and large, mesta production should be encouraged in those areas where the question of replacement of either paddy or jute does not arise. A list of such areas can be prepared only when a detailed survey of the lands put under jute, mesta and paddy, in each State, is made. From our discussions with the various jute interests we understand, however, that the following areas offer facilities for further production of mesta without affecting jute or paddy cultivation and if efforts are concentrated by the State Governments in these areas both the quality and quantity of mesta produced in the country will improve significantly:—

TABLE NO. 13

Areas where Mesta Production can be increased

State	*Centre*
Bihar	Purnea Baidyanath Jhajha Dalkola Samastipur
U.P.	Bareilly Bhajoi Dekanal Pilibhit Rampur Chandausi Faizabad
Orissa	Sambalpur Bargharh Keshinga
West Bengal	Malda Asansol Sub-division Bishnupur Sub-division.
Andhra	Parvatipuram Patnattaam Vizianagram Nellimarla Poundura Sigadam Srikakulam Road Tilaru Sitanagram

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5.13. Bimli Production in Andhra.—Mesta (Bimli) is grown to a considerable extent in Andhra. The quality of the fibre grown here is, however, considered to be inferior. The experts, however, think that if steps are taken to improve the quality of the fibre grown in this State and intensive efforts are made to increase the production, this State offers good prospects for a substantial increase in the production of Bimli. At present most of the Bimli produced in Andhra is consumed by local mills. If the quality improves, it will certainly find good market in Calcutta. Moreover, in the areas where Bimli is grown in this State, there is no serious problem of the diversion of either jute or paddy lands to Bimli if the acreage under it increases. We feel, therefore, that if the quality of the fibre grown can be improved by improved seeds, better retting techniques, control of plant diseases, etc., Bimli production may be further encouraged in this State, particularly in Vishakhapatnam, Srikakulam and Guntur areas, which are suitable both from agronomic and transport cost point of view.

5.14. **Bimlipatam jute in Madras & Mysore.**—Mesta (Bimlipatam Jute) produced in Madras and Mysore is again considered to be inferior to mesta produced in West Bengal, Bihar or Orissa. It rarely finds an outlet in Calcutta market and is generally consumed by local mills. In our view, no useful purpose will be served by further increasing the production of Bimlipatam jute in Madras and Mysore unless the mill industry expands there. As the transport cost to Calcutta is high, it will obviously not be economical for the cultivators to export their produce to Calcutta.

5.15. **Mesta Production in Bombay and Madhya Pradesh.**—Some mesta (Ambadi) is also grown in Bombay and Madhya Pradesh. The production has recently shown a marked increase. In these two States, mesta is generally grown along with cotton; planting being done either in the same line or after a few lines of cotton. Mesta cultivation in these States is thus not done on any commercial scale and rarely does a cultivator grow it as a single crop. There are certain areas in Madhya Pradesh, *e.g.* Chhattisgarh area, Raipur, Bilaspur, Durg, Bastar, etc., where mesta cultivation can be encouraged provided market facilities are ensured. It would, therefore, be worthwhile to grow mesta in these States only in such areas from where the purchase can be conveniently and economically transported to Calcutta. We understand that even for the consumption of a local mill in Raigarh in Madhya Pradesh, the local production of mesta is not sufficient and it would be useful if its production is encouraged in some of the areas mentioned above so as to meet the demand of the local mill industry. Any large scale production of mesta either in Madhya Pradesh or in Bombay, however, does not seem to us to be economically feasible or desirable until and unless adequate and cheap transport to consuming areas can be provided.

5.16. **Plant Protection Measures.**—We have mentioned earlier that Hibiscus Sabdariffa, is more susceptible to plant diseases. If adequate plant protection measures can be taken, it would be more desirable to produce *Hibiscus Cannabinus* than *Hibiscus Sabdariffa*. The cultivators will be benefited all the more because *Hibiscus Cannabinus* occupies land for only about 4 months and a second crop may be grown. The fibre is also relatively strong and white. We feel, therefore, that adequate plant protection measures should be taken immediately to protect *Hibiscus Cannabinus* from plant diseases. The Indian Central Jute Committee may intensify their plant protection measures and bring home to the cultivators the desirability of growing *Hibiscus Cannabinus* instead of *Hibiscus Sabdariffa*. Simultaneously, attempts may also be made to improve the quality of *Hibiscus Sabdariffa* wherever it is being grown. This can be done by using better seeds and taking more care in the retting of the fibre. The Agricultural and Technological Research Institutes of the Indian

Central Jute Committee may also take up the problem of improving the quality and strength of *Hibiscus Sabdariffa* and encourage the use of better seeds for the cultivation of this fibre. If these two pronged measures, *viz.* the protecting of *Hibiscuc Cannabinus* from diseases and improving the quality and strength of *Hibiscus Sabdariffa,* are taken effectively, much of the prejudice against the use of mesta in the manufacture of jute goods will be removed and the problem of mesta, as it presents itself today, may disappear in future.

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CHAPTER VI

Price of Raw Jute

6.1. Importance of Price of Jute.—Our terms of reference do not require us specifically to examine the question of prices of raw jute, but we feel that the problem of jute prices is fundamental to the question of increasing the quantity and improving the quality of raw jute produced in the country. The Conference on Promotion of Jute Production, which proposed the appointment of this Committee, discussed the question of minimum prices at some length and the consensus of opinion at that Conference was that the problem needs a thorough examination. As we have pointed out later in this chapter, the question of minimum prices of raw jute has continuously been raised by practically all jute growing States at several meetings and Conferences. In a recent Press Note of 14th June 1957[1], the Government of India have assured the agriculturists that the prices of foodgrains and other agricultural commodities would not be allowed to fall below economic levels. The Government have further assured them that suitable steps would be taken by it from time to time to achieve this end. In view of this important policy announcement by the Government as well as the crucial role which the prices play in the production of raw jute, we have considered it necessary to examine this important aspect of the jute economy in our report.

6.2. Need for Fixation of Minimum Price of Jute.—The price of raw jute before the sowing time is by far the most important factor which affects the acreage as also inputs like labour and fertiliser devoted to jute in a particular season, and it is for this reason, if not for others, that a demand is often made for fixing a minimum price of jute. The fixation of a minimum price of jute has, however, special difficulties of its own and calls for consideration of several factors. In the first place, there is the need for protecting the interest of the cultivator and of ensuring him a reasonable return on his produce. Secondly, there is the question of maintaining a fair relationship between the prices of raw jute and jute goods. Thirdly, there is the problem of paddy *versus* jute which are competitive crops and the relative level of prices of which influences, to a large extent, the decision of the cultivator to grow more of one or the other crop in a particular season.

6.3. Cultivator's Point of View.—Those who advocate the cause of the cultivator assert that it is the responsibility of the State to ensure him a fair return on his produce. In a predominantly agricultural country like ours, the need for protecting the interests of the cultivator, it is argued, is paramount. The examples of minimum and maximum prices of cotton, minimum prices of sugarcane and the minimum support prices of wheat, jowar, bajra, maize, gram and rice recently fixed by the Government are cited in this context.

Appendix No. A-1.

* Average of 1

6.4. The principle of fixation of minimum prices of agricultural commodities was accepted and advocated by the Prices Sub-Committee of the Policy Committee on Agriculture, Forestry and Fisheries as long back as 1947. The various meetings of the representatives of the State Governments, particularly of the State Agriculture Ministers held at Mussoorie in 1956, have time and again stressed the need for ensuring a minimum price of raw jute to the cultivators. Some of the State representatives have stated, rather emphatically, that unless a reasonable price is guaranteed to the grower of jute, it would be difficult to achieve the target of additional production envisaged in the Second Five Year Plan. It is also maintained by some that the demand for jute being dependent on the foreign demand for jute goods, which is subject to wide fluctuations. the cultivator of jute is more exposed than others to the vicissitudes of the international market and if jute production is to be protected against such vagaries of the market, it is necessary to ensure relatively stable prices of raw jute. Stable prices of raw jute, it is argued, will be welcomed even by foreign buyers who often suffer heavy losses from sharp speculative fluctuations in the prices of jute goods. It is also pointed out that the existing ban on the export of raw jute has cut off competition from foreign buyers and given virtual monopoly of purchase to the Indian jute mills. It is, therefore, a moral obligation of the government, which has banned export, to protect the jute growers from monopsonistic exploitation by fixing a minimum price for raw jute. Some advocates of the cause of the cultivator go even so far as to say that just as no industry can be permitted to exist on sweated labour in a welfare State, similarly it would be unjustified for an industry to exist on raw material which is produced by the sweated cultivator. They further maintain that the industry can and in fact does adjust itself to changes in cost and the fears of losing ground in world markets are greatly exaggerated.

6.5. Relationship between Jute Paddy Prices.—The relationship between the prices of jute and paddy is also a very important consideration because of the substitutability of these two crops. The investigations conducted by the Economic Research Section of the Indian Central Jute Committee show that the jute grower spends a major portion of the cash he gets by selling jute in purchasing paddy during the lean months before 'Aman' crop is harvested round-about November-December. The cultivator is therefore vitally interested in jute/paddy price ratio and it is this factor which largely determines his decision to grow more of one or the other crop. The statistical analysis of the prices and acreage of jute and paddy over a number of years shows that there is a close correspondence between the raw jute/paddy (or rice) price ratio and the acreage sown under jute. In fact a recent study on jute prepared by the F.A.O. demonstrates that even a simple linear relationship "when applied to the data (of jute/rice price ratio and jute acreage) does, in fact yield a relatively high degree of correlation"[1]. A striking proof of the close relationship between the price ratio and acreage sown to the two crops is provided by the experience of 1953-54 when because of the fall in jute prices in 1952-53 season by about 45%, as against the decline of 30% in the case of rice, acreage under jute fell from 18 lakhs acres to only 12 lakh acres and the production of jute fell from 46 lakh bales to 31 lakh bales in one year. The acreage under rice during the same period went up by more than 3 million acres in the whole country and in West Bengal, the main jute growing State, it went up by more than 3 lakh acres. The following figures for the last few years will further bear out the close relationship between jute and paddy (or rice) prices and their acreages:—

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[1] F.A.O. Jute Survey, 1957, pp. cit. p. 21.

TABLE NO. 14

Jute/Rice Price Parity and Acreages

(Thousand acres)

Crop Year	Jute/rice price parity before sowing time†	Area under Jute All India	Area under Rice—All India
1	2	3	4
1952-53	2·38 (3·57)	1,813	74,056
1953-54	1·11 (1·66)	1,228	77,318
1954-55	1·72 (2·57)	1,243	75,949
1955-56	2·41 (3·62)	1,739	76,253

NOTE.—Figures in brackets in Col. No. 2 show Jute/paddy price parity.
†Average for four months—January to April.

In view of such a great impact of price ratio on the acreage of the two crops, the need for maintaining a proper parity between the prices of these two competing crops assumes great significance.

6.6. The question of fixation of minimum parity prices of raw jute has been discussed on several occasions. The Flood Commission which examind the question in detail in 1938—40 recommended the fixation of a normal parity between jute and paddy prices. Although the Jute Enquiry Commission (1954) did not specifically recommend the fixation of minimum price of raw jute, it suggested, nevertheless, that a fair price of jute should be fixed and notified by the Jute Board before the sowing season. The fair price suggested by the Commission was to be worked on the basis of parity between prices of raw jute and jute goods. The Commission felt that "the notification of parity of fair price is of particular significance to the grower before the sowing season. It will give him a proper lead and its prescription would in itself improve the morale of the grower."[1]

6.7. Relationship between Raw Jute and Jute Goods Prices.—In is generally admitted that in view of our vulnerable position in the foreign markets, the fixation of a minimum or fair price of jute on any arbitrary basis would not be desirable. Of the total production of jute goods in the country, about 80% is expected and the increasing competition from

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[1] Jute Enquiry Commission's Report—1954, p.76-77.

Pakistan and also Japan makes it imperative that the cost of the raw material which forms about 60% of the total cost of production of jute goods, should be at a competitive level. The maintenance of a fair relationship between the prices of raw jute and jute goods is, therefore, as important as the guarantee of a minimum or 'parity' price to the jute grower. Thus the main factors which have to be taken into account in the fixation of a minimum price of jute are: a reasonable return to the cultivator, a normal parity between paddy (or rice) and jute prices and a fair relationship between the prices of raw jute and jute goods. All these factors need detailed examination from season to season and only a permanent price fixing organisation will be in a position to examine them on a regular and scientific basis. We have, however, made an attempt to work out, by way of illustration, the broad levels of prices for raw jute on the basis of these three criteria.

6.8. Cost of Production of Jute.—From the cultivator's point of view, it is essential that a reasonable return should cover his cost of production plus a reasonable profit. Some studies have been made on the cost of production of jute by the Economic Research Section of the Indian Central Jute Committee. According to Indian Central Jute Committee's studies, the cost of production of jute in five selected centres during the last few years was as follows:—

TABLE NO. 15

Cost of Production of Jute

[Rs.per md.]

	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56
Monoharpur (West Bengal)	49-7	28-3	34-5	28-3	28-2	30-4
Belakoba (North Bengal) .	28-14	26-13	19-3	14-14	20-13	16-14
Purnea (Bihar) .	26-0	26-13	17-3	17-1	14-0	15-2
Kendrapara (Orissa) .	23-5	24-8	17-4	21-1	16-10	16-15
Nowgong (Assam) .	25-0	33-9	22-3	17-5	18-1	21-9

6.9. It will be observed from the above table that the cost of production of jute varied widely from centre to centre. The maximum cost was in Monoharpur (West Bengal), while in Purnea (Bihar) it was the lowest. Most of the fibre grown in Purnea is of inferior variety and the cost of production figures for this area should be considered with reservation. Since the bulk of jute is grown in West Bengal, which is also proximate to the main consuming centre, Calcutta, the minimum price should cover the cost of production in West Bengal. The fibre grown in Monoharpur is, however, of a relatively better quality and appropriate adjustments may have, therefore, to be made for fibre of relatively inferior quality in fixing minimum prices. Account should also be taken of the fact that while cost of production in up-country centres is lower, the cost of transport from those centres to Calcutta is higher.

6.10. The second consideration in fixing a minimum price is the normal parity between jute and paddy prices. The Floud Commission considered 3 : 1 as the normal parity between jute and paddy prices while the

Jute Commission was of the view that "there is no special significance about the ratio of 3 : 1 which has prevailed mainly during the World War II. In fact, throughout the decade before the War, the ratio of jute to paddy prices was nearer 2 : 1." The comparison with what existed before or during the War may be of little practical significance now. Costs and prices have changed and have adjusted to new levels since the end of the War. It may, therefore, be more desirable to consider the conditions as exist at present than what prevailed about two decades ago.

6.11. **Parity between Raw Jute and Paddy Prices.**—We have examined the data for the last five years 1951-52 to 1955-56, as given in Appendix B-XVI which show that the average fair parity would be 2.7:1 between jute and paddy prices or 1.8 : 1 between jute and rice prices. During this quinquennium the ratio of raw jute to paddy prices varied greatly and its effects were reflected in significant changes in acreages sown under jute[1] Over 60 per cent. of the parity ratios in various centres during these years clustered within the interval of 2.1 to 3.3 and the midpoint of the central interval works to about 2.7. It will also be observed from these data the most favourable parity for jute as compared with paddy was in 1951-52 season—being 4.26 : 1—with the result that the production of jute in 1952-53 was next to the record production since partition. On the other hand, the parity was most unfavourable to jute during 1952-53 season—1.66:1—which had its repucussions on jute production in 1953-54 when it dropped by about 50 per cent. as compared to the previous year. The parity again improved slightly in favour of jute during 1954-55 season and the production of jute in 1955-56 went upto nearly 42 lakh bales as against 29.28 lakh bales in the previous year. It will thus be seen that the production of jute received considerable stimulus when the price parity was more than 3:1 as compared to paddy. In fact, the parity price, in 1951-52 which was responsible for almost record production in the following season, was about 4.5 : 1 in West Bengal, 3.1 : 1 in Assam and 4.5 to 4.75 : 1 in Orissa, as compared to paddy.

6.12. The surveys conducted by the Economic Research Section of the Indian Central Jute Committee in the following five centres reveal that the parity between jute and paddy prices during 1954-55 was 2.8 while in 1955-56 it was 2.63:—

TABLE NO. 16

Jute Paddy Price Parity

Centre	1954-55	1955-56
Monoharpur (West Bengal)	2·57	2·37
Belakoba (North Bengal)	3·01	2·79
Purnea (Bihar)	2·59	2·52
Kendrapara (Orissa)	4·91	3·84
Nowgong (Assam)	2.28	2.44
All centres weighted average	2·80	2.63

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[1] In the absence of paddy prices, calculations have been made with rice prices of coarse variety and the ratios have been converted in terms of paddy *i.e.*, 1½ times of rice.

6.13. **It is also interesting to note from the following figures collected** by the Indian Central Jute Committee that the ratio between cost of jute and paddy in these centres was more than 2 : 1 during these two years:—

TABLE NO. 17

Jute Paddy Cost Ratio

Centre	1954-55	1955-56
Monoharpur	1·84	2·62
Belakoba	2·19	1·99
Purnea	1·19	1·54
Kendrapara	2·42	2·59
Nowgong	1·68	1·85
All centres weighted average	2·09	2·63

6.14. **Though the cost ratio is a little lower than the price ratio between** jute and paddy, it may be noted that the paddy grower has to put in less effort and bear less risk and trouble compared to the jute grower on account of the very nature of the two crops. Since jute requires a greater input of human labour, the proportion of hired labour used in jute is higher than in paddy and this involves a higher paid operational cost for jute as compared to paddy and requires a substantial investment both in the total as well as in cash. These factors, among others, explain why a large shift from paddy to jute cultivation is not possible unless the parity is significantly in favour of jute.

6.15. **A fair relationship between raw jute and jute goods prices is no** less important. The Jute Enquiry Commission felt that when the price of 100 yards of Hessian 40"×10 oz. was Rs. 44 to Rs. 46 and of Sacking (per 100 bags) was Rs. 108 to Rs. 114, the fair price of jute would be between Rs. 24 to Rs. 26. Assuming that this was a reasonably correct assessment based on the detailed analysis of the cost of production of jute goods, the fair price of jute since the Commission reported would have been as follows:—

TABLE NO. 18

Fair Price of Raw Jute on the basis of Jute Enquiry Commission's Formula

	1954-55	1955-56	1956-57*
Average price of Hessian 40" × 10 oz. per 100 yds.	44 13 0	39 9 0	42 7 0
Fair price of raw jute	23 6 0 to 25 5 0	21 9 0 to 22 6 0	23 2 0 to 24 1 0
Average price of Sacking B Twill per 100 bags.	117 9 0	109 9 0	112 10 0
Fair price of raw jute	24 12 0 to 26 13 0	23 1 0 to 24 15 0	25 0 0 to 25 11 0
Actual market price of raw jute Assam (Bottom, Calcutta)	29 11 0	27 4 0	30 7 0

*Average of 10 months—April—January.

6.16. In the above table, the actual market prices have also been given separately for purposes of comparison. It will be observed that on the basis of the formula suggested by the Jute Enquiry Commission, the actual market prices which prevailed during 1954-55, 1955-56 and 1956-57 were higher than those which would have been regarded "fair." This obviously, shows that the industry has been able to pay a substantially higher price than what was considered "fair" by the Jute Enquiry Commission. It has been argued by some that as a result of higher price of raw jute the mills have suffered losses and some of them have closed down recently. We understand, however, that the closure of some of the mills in recent months was really due to reasons other than high cost of raw material. In any case, the fact that the industry has been able to export more jute goods in recent years and has maintained its competitive position in world markets even after paying a higher price of raw jute, compared to what was considered fair by the Jute Enquiry Commission, shows that the "fair" price indicated by the formula suggested by the Commission was an underestimate, to the extent of Rs. 4 to Rs. 6.

6.17. 'Minimum', 'Reasonable' and 'Fair' Prices of Jute.—From the foregoing analysis there emerge a few sets of prices of raw jute which may be regarded as 'minimum' from the cost of production angle, 'reasonable' from parity ratio point of view and 'fair' in terms of relationship between raw jute and jute goods. These are indicated below:—

TABLE NO. 19

Price of Jute on three Different Basis

	Cost of production			Jute/paddy parity basis			Raw jute/jute goods relationship basis					
	(a)			(b)			J.E.C.'s formula (c)			On the basis of current year's price of jute (d)		
	Rs.	a.	p.	Rs.	a.	p.	Rs.	a.	p.	Rs.	a.	p.
1954-55	28	3	0	27	11	0	25	0	0	32	0	0
1955-56	28	2	0	32	0	0	23	0	0	29	0	0
1956-57	30	4	0	34	2	0	24	8	0	30	7	0

(a) Cost of production figures are based on I.C.J.C's survey and relate to Monoharpur Centre.

(b) These figures have been worked out on the basis of jute/paddy parity ratio of 2·7 : 1 or jute/rice parity ratio of 1·8 : 1.

(c) The figures have been worked out on the basis of the formula suggested by the Jute Enquiry Commission for determining a fair relationship between jute/jute goods prices.

(d) The figures have been worked backward on the basis of current year's 1956-57 prices of raw jute at Calcutta (average for 10 months—July to April).

6.18. The three sets of figures given in the above table vary widely. The price of jute as indicated by the cost of production may no doubt be the rock bottom below which it should not be allowed to fall. But since cost of production varies widely from place to place it cannot by itself be a firm basis for price fixation. The reasonable price based on jute/paddy price ratio is the one which will maintain the desired cropping pattern. The 'fair price' based on the price of jute goods, on the other hand, indicates in a way the limit upto which raw jute prices can go without adversely affecting the competitive position of our jute goods in the world markets. In effect, therefore, all the three sets of prices will need careful consideration before a minimum support price can be announced and enforced by the Government. Moreover, in fixing the actual level of the minimum support price in a particular year factors like market conditions, cropping pattern desired at a particular time, etc., will have also to be taken into account besides the above three sets of prices.

6.19. Minimum Prices in up-country Markets.—The minimum price of jute at up-country centres will naturally be lower than the minimum price at Calcutta, suggested above. Normally, the difference between the minimum up-country price and Calcutta price should be indicated by the transport charges from village to market and from market to Calcutta. According to a survey conducted by the Economic Research Section of I.C.J.C., these transport charges in 1955-56 in a few up-country centres were as follows:—

TABLE NO. 20

Transport Charges from Up-country Markets to Calcutta during 1955-56

Secondary market	Transport & other costs from village to markets			Cost of transport to Calcutta (including Calcutta expenses)			Total		
	Rs.	a.	p.	Rs.	a.	p.	Rs.	a.	p.
Sheoraphuli (West Bengal)	0	4	0	0	13	0	1	1	0
Belakoba (West Bengal)	0	3	10	2	12	8	3	0	6
Purnea (Bihar)	0	2	4	2	4	2	2	6	6
Danpur (Orissa)	0	5	10	2	0	5	2	6	3
Nowgong (Assam)	0	5	0	4	2	1	4	7	1

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This, while considering the factors for determining the minimum price of jute to be guaranteed to the grower, the cost of transport from the up-country centres in a State to the main consuming centre, Calcutta, will also have to be taken into account by the authorities concerned and adjustments made accordingly.

6.20. It is easy, however, to fix and announce a minimum support price of jute. The difficulty arises when this price has to be enforced in practice. One of the main objections put forward by the Chairman of the Indian Jute Mills Association against the fixation of a minimum price of jute was that it would be difficult to enforce it in practice. While we fully realise the practical difficulties in enforcing any minimum price, it seems to us, that they are not insuperable and in any case not more difficult than for cotton for which minimum and maximum prices are being fixed every year as a matter of routine. In fact, minimum and maximum prices of raw jute used to be fixed by the Government during the War period, though this was done more from the point of view of preventing prices from going above a certain level than for protecting the interests of the cultivators by not allowing them to fall below a minimum level.

6.21. Methods of Supporting Minimum Prices.—In case minimum support prices of jute are now fixed by the Government, they can be enforced if need arises, in several ways. In practice, however, we feel that the possibility of the Government being required to enter into the market for supporting the price at specified minimum price is not likely to arise in the present circumstances. In our view, the mere announcement of the minimum prices should tone up the market and keep prices well above the minimum. If, however, prices do sag and tend to fall below the minimum level, either of the following methods can be considered for action.

6.22. Buffer Stock Operations.—The most effective method of supporting prices is what is known as 'buffer stock operations'. In this case the Government organisation enters into the market and buys the commodity on its own account at the specified minimum price and thus checks them from falling below that level. This, however, requires a certain amount of working capital and adequate warehousing facilities. This method was followed successfully in the case of foodgrains in 1954-55. If the experience of the foodgrains is any guide, it is unlikely that for imparting the necessary strength to prices, more than 2 per cent. of the total production of raw jute and mesta will have to be bought by the Government at any time. This will require a working capital of about Rs. 2 crores. There is little possibility of incurring a loss in these transactions for it is more likely that jute would, ordinarily, be sold late in the season at higher prices than those at which it would have been bought and the organisation may, in fact, make some profit. Even if some loss is incurred by way of storage charges, administrative expenses, wastage etc., the amount involved is unlikely to be more than 1 to 2 per cent. of the total outlay, *i.e.* roughly about Rs. 2 to Rs. 4 lakhs. This, by no means, is a large amount and can be treated as subsidy by the Government to the grower of raw jute. In all likelihood, the eventuality of incurring a loss on the buffer stock operations will not arise so long as the internal supply continues to remain short of the demand.

6.23. Purchase by Co-operative Marketing Board or a Marketing Association.—In case the Government itself does not want to undertake the buffer stocks operations, the work can be entrusted to a Co-operative Marketing Board or a Marketing Association of the trade or of mills which would purchase raw jute from the cultivators at the specified minimum price, wherever necessary, hold stocks at appropriate stages in the process of marketing and sell them in the market so as to maintain the prices within the range fixed by the Government. The State can exercise supervision over such a body and if need arises make good the loss it may suffer in the process. In this case the Government would not have to find the working capital and as the possibilities of a loss are remote, it may, in fact, achieve the purpose by simply announcing the prices of raw jute and entrusting the work to an independent organisation.

6.24. Buying Programme of the Mills.—An indirect method of enforcing minimum prices is to lay down a buying programme for the mills so that specified quantities are brought by them according to a fixed time table.

This would discourage their tendency to keep off the market during the harvest time. Such a scheme was worked in 1940-41, when, in pursuance of a decision reached between the Government of India and the Indian Jute Mills Association, the latter agreed to recommend to its members the adoption of a buying programme upto a specified quantity according to a fixed time table. It was also agreed at that time that any deficiency in the purchase by the mills was to be made good by maintaining purchases by the Government of Bengal (which eventuality, however, did not arise as the announcement of the buying programme by Indian Jute Mills Association itself produced a stabilising effect on prices). The buying programme can either be worked voluntarily or statutorily if necessary. In our opinion, voluntary efforts of the Indian Jute Mills Association, which is an enlightened body, would serve the purpose and it may not be necessary for the Government to prescribe a buying programme statutorily. The buying programme have to be supplemented by a proper stock policy of mills as well as import policy with regard to raw jute. We have discussed these aspects of the problem elsewhere in the report.

6.25. Need for watching the Situation.—We recognise that for various reasons it may not be possible for Government to fix statutorily the minimum price of jute. Nevertheless, it will be necessary to calculate the minimum price of jute every season for the purpose of the implementation of Government's announcement dated the 14th June, 1957 referred to earlier. If market prices tend to fall below the minimum, the Government may take one or more of the measures suggested above for ensuring economic price to the grower. This will have the advantage of avoiding any statutory obligation on the part of the Government to enter into the market and buy jute on its own account, and at the same time achieve the object of protecting cultivators' interests. We may add, however, that if minimum price for rice is fixed in pursuance of the Governments' announcement dated the 14th June, 1957 referred to earlier, fixation of minimum price for jute at a corresponding parity may become necessary if jute production is to be stepped up.

6.26. Pakistan's Price Policy.—It would not be out of place to mention here the recent decision taken by the East Pakistan Government to set up a Jute Marketing Corporation with an authorised share capital of Rs. 8 crores. The Government of Pakistan would contribute about Rs. 2 crores towards the share capital of the Corporation. The Corporation, whose aims and objects are to ensure fair prices to the jute growers and bring about stability in the jute market, is expected to start open market operations from 1st July, 1957. It would not be a profit making concern and the transactions will be on the basis of minimum rock bottom prices to be determined by the Government for season in relation to the export minimum prices which will be fixed by the Government. This indicates that the Indian jute mills may have to pay a higher price of jute as may be determined from time to time by the Pakistan Marketing Corporation in the interest of their own cultivators and economy. Obviously, the effect of this would be far-reaching on our competitive position in world markets *vis-a-vis* Pakistan. The need for stepping up our internal production of jute as early as possible becomes, in this context, very pressing and the desirability of giving proper price incentive to the cultivator for this purpose becomes all the more urgent.

CHAPTER VII

MILLS STOCKS OF RAW JUTE

7.1. Purchase of Raw Jute by Mills.—The purchases of jute by mills and its stocks held by them at different periods have a significant impact on the market price of jute. If the mills by building up large stocks of jute can afford to keep off the market early in the harvesting season, the price of jute will tend to fall and the cultivators will suffer. Conversely, if the stock position is very low, jute prices will tend to rise. The quantity of stocks to be held by mills is dependent on several factors, such as availability of jute both in India and from Pakistan, price trends in the market, foreign demand for jute goods, etc., and ordinarily an individual entrepreneur is in a better position to decide about the quantum of his stocks of the raw material. So long as the market forces have their free play and there is no indication of the buyers or sellers exploiting the weak position of the other, there is no need for interference by an outside agency. We were told, however, that one consequence of the ban on the export of Indian Jute has been that the jute mills tend to go slow in making purchases when the Indian crop comes to the market and the Indian cultivator is keen to sell his produce. They know that the Indian crop will be available to them anyhow and they are in no hurry to buy this crop. On the other hand they try their best to purchase whatever they require from Pakistan during the earlier months of the season, lest it is taken up by foreign mills. This depresses the prices of Indian jute to the detriment of the cultivator's interest and when the cultivator's holding power is exhausted the mills build up relatively large stocks towards the end of the season at a relatively low price and these large stocks enable them to repeat the go-slow purchase policy during the early months of the next season. The following figures published by the IJMA will be interesting in this context:

TABLE NO. 21

Monthly Purchases of Raw Jute by IJMA Mills

[Thousand bales of 400 lbs. each]

	1953-54	1954-55	1955-56	1956-57
July	306	292	284	341
August	222	361	265	493
September	232	374	406	503
October	445	472	558	509
November	465	684	579	661
December	430	411	391	713
January	331	542	597	464
February	222	321	346	423
March	267	255	405	294
April	290	219	376	..
May	254	179	385	..
June	323	309	378	..
TOTAL	3,787	4,419	4,970	4,401

7.2. It will appear that the allegation about mills buying much less in the beginning of the season is borne out to some extent by the above figures. Jute starts coming in the market from July and it is in the early months of the season that purchases by mills ought to be heavy. But, as the above figures show, only about 20% of the total purchase of Indian jute by mills are made during the first three months of the season (July to September) with the result that prices of raw jute in mofussil centres are almost lowest during these months. The information available with the Indian Central Jute Committee shows that in West Bengal about 85% of the total production of raw jute and in Bihar about 75% of the total production comes into the market by December. As against this, the purchases made by the mills upto December are only about 50% of their total purchases.

7.3. Stocks of Raw Jute with Mills.—The tendency of the mills to keep away from the market during the beginning of the season is also borne out by the following figures of stocks of raw jute with mills:—

TABLE NO 22

*Stocks of Raw Jute**

(Thousand bales of 400 lbs. each)

	1954	1955	1956	1957
January	1,495	1,364	1,179	1,364
February	1,524	1,432	1,316	1,426
March	1,429	1,413	1,370	1,384
April	1,298	1,274	1,319	
May	1,243	1,105	1,090	
June	1,151	900	839	
July	992	656	639	
August	810	433	542	
September	705	386	503	
October	818	532	625	
November	1,110	805	902	
December	1,303	1,010	1,144	

7.4. It will be observed that the stocks of jute with the mills are highest at the end of the season and these are drawn upon by the mills during the period when the new crop comes into the market—a phenomenon which is *prima facie* abnormal. The reduction in stocks of jute with the mills during the period July to September is generally more than 50%; this tends to support the view held by some that the mills being sure of the supply of the jute in the country tend to take advantage of their monopolistic position in the market.

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*Figures relate to I.J.M.A. Mills and Press Houses in the membership of the Calcutta Baled Jute Association.

7.5. Minimum safe Stocks.—The representatives of the various jute trade associations and the Chairman of the Indian Jute Mills Association informed us that, as against the stocks of about 3 to 6 months maintained by the mills before the war, they are now maintaining stocks of 2 to 3 month's requirements. In fact, at times the stock has been as low as 2 to 3 weeks' requirements. The reasonable monthly requirements of jute and mesta by the industry, with 12½% looms sealed, is considered to be about 5 lakh bales. These representatives further felt that though, the minimum safe stocks would be about 1½ months' requirements, the reasonable level of stocks should be reckoned at about three months' requirements while the maximum stocks to be held at any particular time, might be about four to five months' requirements.

7.6. Regulation of mills' stocks of raw jute.—We have mentioned in a previous chapter on minimum prices that one of the methods by which support can be given to the prices of jute is to require the mills to maintain a minimum level of stocks at the harvesting season. This would ensure a regular and stable demand in the market, particularly during the harvesting period when the cultivator is keen to sell his produce. We feel that the tendency of the mills to keep away from the market at a time which is crucial to the cultivator, is undesirable. They could not afford to do so if exports of raw jute were not banned. The problem of supporting prices will be solved to a considerable extent, if the mills voluntarily undertake to maintain a reasonable stock and ensure the flow of demand at the harvesting time. In our view about two to three months' stock, *i.e.* roughly 10 to 15 lakh bales, ought to be built up by the mills particularly during the first five months of the season, (*i.e.* from July to November) when most of the produce is marketed by our cultivators. It is likely that if the desirability of maintaining a minimum level of stocks is brought home to the Indian Jute Mills Association, it might be able to persuade its member-mills not to desist from buying jute in the early months of the season and to maintain a reasonable stock during these months. If, however, voluntary efforts do not bring about the desired change in the stock policy of mills the Government may consider the adoption of some other measure for the purpose. The regulation of import policy, as suggested by us, can be of great help in this respect, for if imports are restricted to the minimum in the beginning of the season, the mills will have to buy in the home market.

7.7. Buying Programme.—We have already referred to the 'buying programme' which was laid down by the Indian Jute Mills Association, for their member-mills in 1940-41 for giving support to the falling jute prices. The need for such a programme is great in the larger interest of the cultivator as well as for the achievement of the jute production target. We are sure, the Indian Jute Mills Association will not be wanting now, as they were not in 1940-41, in extending their full co-operation for solving this basic problem of the jute economy.

7.8. Long-term Solution.—The more permanent and long-term solution of the problem would, of course, be provided by setting up either a Government organisation or a Co-operative Marketing Organisation which would buy jute from the cultivators at a reasonable price at the harvest season and sell to the mills later at a competitive price. Such an organisation alone will be able to protect the interests of the cultivator effectively. Till, however, such a system is put into operation and adequate warehousing facilities are available a regulated stock policy for the mills as suggested above will go a long way in solving the problem.

7.9. Co-operative Marketing Board.—The minimum stock policy as suggested above will not be able to meet a situation when, as a result of either increased production of jute or any other market factor, prices of jute fall heavily and minimum purchases by the mills are not sufficient to import the necessary strength to prices. In such an event, either the mills will have to be required to buy more than their 'normal' requirements of two to three months, or the Government organisation will have to step into the market and purchase large quantities of jute. It may not be fair to compel the mills to buy more than their 'normal' requirements unless the Government is prepared to finance them and bear the loss that might be incurred by them by holding larger stocks than they would have done otherwise. This will cause complications and may not be considered desirable. The only alternative in that case seems to be to set up a government organisation or a Co-operative Marketing Board which would buy the required quantities of raw jute at minimum prices fixed by the government. Such an eventuality, however, is unlikely to occur and we hope that the regulation of the buying policy of mills and imports from Pakistan will be sufficient to impart the necessary strength to market prices.

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CHAPTER VIII

IMPROVEMENT OF QUALITY AND MARKETING OF RAW JUTE AND MESTA

8.1. During the course of our discussions with the various jute interests, certain measures for the improvement of quality, production and marketing of jute were suggested to us. Though these do not fall strictly within our terms of reference, we would like to take the opportunity of mentioning them here as they have some bearing on the availability of jute in the country.

8.2. **Tamarind-water Treatment.**—The Jute Agricultural Research Institute of the Indian Central Jute Committee have evolved a process of treating dark colour jute with tamarind-water which, it is said, improves the colour of the fibre significantly. We were shown two samples by the Director of Jute Agricultural Research Institute, Indian Central Jute Committee the original dark colour or shyamla jute produced in some areas ad the same after treatment with tamarind-water. The colour of the jute which had been treated by tamarind-water had significantly improved and practically all the representatives of the trade present at the meeting agreed that this would easily enjoy a premium of about Rs. 3 per maund over the original shyamla jute. It is estimated that the cost of treating jute with tamarind-water would be only about 10 annas per maund and as such there will be a net gain of more than Rs. 2/- per maund to the cultivator if he adopts the tamarind process. The process is a simple one. The cultivator would need three vats. In one of them a weak solution of tamarind is prepared while the other two contain fresh water. Immediately after the fibre is extracted from the plant it is dipped while still wet in the tamarind solution for about five minutes. It is then taken out and washed successively in the two fresh water vats. The whole process, therefore, does not take more than 10 to 15 minutes. It can be best done by the cultivator himself as the wet jute immediately after retting has to be dipped in the tamarind-water. Once the jute has been retted, dried and sold it is not practicable to treat it with the tamarind-water. A note on the subject supplied to us by the Director of the Jute Agricultural Research Institute is given in Appendix A V.

8.3. A few points were, however, raised in this connection. It was apprehended by some that if by this process the strength of the fibre is weakened, the advantage gained by the improvement of colour would be lost. We discussed this aspect with the Director, Jute Technological Research Laboratories, Indian Central Jute Committee, and the Director, Research Institute, Indian Jute Mills Association. Both of them were of the opinion that the fears about the weakness in strength, as a result of the tamarind-water treatment, are rather exaggerated. We have, however, requested them to conduct some research on this point and let the Government know about the strength of the tamarind-water treated fibre. We have also requested them to examine if some cheap chemical could be substituted for tamarind. If their results are favourable, it seems desirable to us to popularise the use of this process amongst the jute cultivators.

It will be useful if a small pamphlet is prepared by the Indian Central Jute Committee giving the details of the tamarind process and its advantages. This pamphlet may be distributed widely in those jute growing areas where the colour of the jute produced is dark or shyamla. There are some areas *e.g.* in Cuttack district in Orissa and Purnea district in Bihar, where the jute grown is of good quality but the colour is dark and if this jute is treated with tamarind-water, much of our shortage of white jute would be met. To begin with, however, the experiment may be confined to some of these areas and if it proves successful and worthwhile, the desirability of its wide adoption may be considered.

8.4. Import Duty on Bleached Jute Goods.—A representative of the Indian Jute mills Association expressed the fear that the tamarind-water treated jute might be classified by U.S.A. as bleached jute and the hessian prepared out of it might be subjected to a higher import duty. The advantage thus gained by treating the jute with tamarind-water would be lost by the mills in the payment of a higher duty. Our attention was drawn in this connection to paragraph 1008 of the U.S. Tariff Act, as amended. with respect to U.S. import duty, which specifies that, "woven fabrics wholly of jute, not specially provided for, not bleached, stenciled, painted, dyed, coloured, or rendered non-inflamable, ½ cent per pound; bleached, printed, stenciled, painted, dyed, coloured, or rendered non-inflamable, ½ cent per pound and 5 per cent. *ad valorem.*" The Calcutta Jute Fabric Shippers' Association have also received a letter from the Textile Bag Manufactures Association and the Burlap and Jute Association, U.S.A., requesting them to advise their members in Calcutta that unless otherwise advised by cable, when an offer of acceptance is made, it is to be understood that any "bright" burlap offered or accepted as such will not be bleached, dyed or coloured and if U.S. Customs assess duty at 5 per cent. *ad valorem* in addition to the specific duty of 1/2 cent per pound on any burlap described as 'bright', the buyer will have a valid claim for the 5 per cent. *ad valorem* duty. We do not know the reasons why the chemically treated jute goods have been assessed at a higher rate by the U.S. Customs. It seems to us to be an unfair discrimination aimed in effect against Indian products *vis-a-vis* Pakistan products. We would suggest that the Ministry of Commerce and Industry should examine the matter carefully and take it up with the U.S. authorities, if necessary. In any case, tamarind-water treatment should not be regarded as a chemical treatment of fabric. It is really part of an improved method of retting and is necessary to remove the tannin in jute plants and iron in retting water which darken the colour of the fibre.

8.5. Extensive Cultivation.—We have noted in a previous chapter that the supply of raw jute and mesta in the country falls short of the requirement and in the interest of the country it would be preferable if the deficiency is met by increasing the internal production as early as possible. This can be done either by increasing the area under jute and/or mesta or by intensive cultivation and increasing the yield per acre. We have already referred to the limited possibility of bringing in more areas under jute and/or mesta. There are, no doubt, some possibilities in this respect in Assam, U.P. and Orissa. To the extent it is possible without affecting the production of paddy, it would be desirable to bring in additional areas under jute and mesta. In some cases double cropping can also be resorted to. But, the main increase in the production would have to be achieved largely by intensive cultivation of the existing jute/mesta lands.

8.6. Our yield per acre of jute is only about 2.5 bales as compared to 3.5 bales in Pakistan and about 5 bales in China. There is thus great scope and need for increasing our yield per acre. One advantage of intensive cultivation is that it will enable increase in production of jute in areas where good retting water especially slow flowing canal or river water, is already available. We recommend that special attempts should be made to intensify the cultivation of jute in the neighbourhood of slow flowing canals and rivers.

8.7. Intensive Cultivation : Top Dressing.—Intensive cultivation implies better manuring, improved seeds, improved cultural practices, control of pests and diseases, etc. Experiments have shown that top-dressing of jute with chemical fertilisers (when the crop is about 1 to 1½ months old) at 100 lbs. per acre gives an additional yield of 2 to 6 maunds of fibre per acre. The application of fertilisers, especially of nitrogenous fertilisers, can thus play a very important role in our drive for increased production of jute. The programme for top-dressing of jute is being taken up by the State Governments from the current season *i.e.* 1957-58, and it is proposed to apply fertilisers to about 6 lakh acres, *i.e.* about 50 per cent. of the existing area under jute, by the end of the Second Plan period. This, it is estimated, would result in the additional production of about 6 lakh bales. We feel that it is essential that this programme, which offers the best potentialities for the increase in production, should be taken up in right earnest by the State Governments and the use of fertilisers by the cultivators should be popularised as much as possible. What is needed is to make the fertilisers available to cultivators in every village at the right time and to educate them about the advantages of top dressing.

8.8. The representatives of the trade associations and the Indian Jute Mills Association with whom we had discussions extended their full support to the Government in distributing fertilisers. The Chairman of the Indian Jute Mills Association was good enough to offer to print and distribute pamphlets on the use of fertilisers through their agencies and at their own cost. Some trade associations also offered the help of their local agencies in popularising and distributing fertilisers. The State Governments might like to take advantage of such a cooperative spirit of the trade in making the fertiliser drive a success. Some trade associations also felt that during the period fertilisers are to be used, the State officials should undertake extensive tours and inspect the actual distribution and the use of fertilisers.

8.9. Improved Seeds and Cultural Practices.—We can hardly overemphasise the need for making available to the cultivators improved seeds in adequate quantities and at reasonable terms. Though some steps have already been taken by the Government in this direction, it is desirable that these should be stepped up quickly. The adoption of improved cultural practices is also no less important. It is estimated that line-sowing by seed drill and subsequent inter-culture by wheel-hoes, besides increasing the yield of fibre, reduces the cost of cultivation by about 20 per cent. The extra yield obtained in line-sown jute averages 10 to 20 per cent., while a substantial reduction in weeding cost which covers nearly 25 to 40 per cent. of the entire cost of cultivation, is also effected. Attempts, should, therefore, be made to procure adequate number of seed drills and wheel-hoes and to distribute them to the cultivators as widely as possible.

8.10. Plant Protection.—Jute plants are susceptible to various diseases and pests. The annual loss due to the attack of diseases and pests is roughly estimated to vary between 2 to 10 per cent. affecting about 15 per cent. of the total jute area every year. The adoption of appropriate plant protection measures will thus save a considerable quantity of jute. We have already referred, in a previous chapter, to the urgent need for conducting some research for protecting *Hibiscus Cannabinus* variety of Mesta from the diseases to which it is susceptible. We would like to emphasise the importance of undertaking adequate and quick plant protection measures so as to save as much jute crop as possible from loss.

8.11. Interim Recommendations.—The Chairman of the Sub-Committee emphasised these points at the meeting of the State representatives held at Calcutta on 18th April, 1957 and stressed the urgency of supply of fertilisers for the current year's crop. A list of trade associations which offered their cooperation in this respect was also supplied to the State representatives present at the meeting. The progress made by the State Governments so far, in the matter of supply of fertilisers, does not seem to be very encouraging. We hope that in future more earnest attention will be paid in this respect. The achievement of the additional target of production of jute depends almost entirely on intensive efforts for the supply of better seeds, fertilisers, and adoption of improved cultural practices by the cultivators and if these are not given the importance and urgency they deserve, we are afraid the deficiency in our supply may be much greater than what has been estimated by us.

8.12. Pressing and Baling of Jute.—Some of the trade representatives also pointed out to us the need for setting up small pressing and baling machines at the producing centres so that jute or mesta is pressed in bales at the producing centres. This, it was pointed out, would cut down the cost of transport and storage incurred at present by the jute dealers and mills. The loose fibre is at present transported in drums from the producing centres and stored by the mills as such, which besides raising the cost of transport is highly inflamable and requires a higher insurance premium. If the raw jute is pressed and baled at the producing centres, the traders and millers will be able to economise in the cost of transport and insurance charges and a large proportion of this gain would be passed on to the cultivator. The example of cotton pressing and baling was cited by some people who felt that there is no reason why jute baling and pressing cannot be done in rural areas. The suggestion indeed deserves full consideration and it would be worth-while to explore the possibilities of establishing cooperative presses in producing centres. The cost of a small press is said to be about Rs. 4,000 to 5,000/- and it is within the capacity of cooperative societies to establish such presses for the benefit of the cultivators. The reports from the State Governments indicate that transport has been one of the major bottlenecks in some of the States, particularly in Bihar and U.P. Wagon shortage for the transport of jute is said to be more acute in Bihar between August and December, while in U.P. it is said to be a chronic problem. While these transport bottlenecks call for varied action on the part of transport authorities, we feel that the transport of jute in pressed bales would help in reducing the burden on rail and road traffic and would thus contribute, in a measure, to the reduction of the intensity of transport difficulties and bottlenecks.

8.13. Grading of Jute.—Grading and standardisation of raw jute has unfortunately not so far received the attention it deserves. In the absence of proper standardisation of the various types of raw jute produced in different areas it not only becomes difficult to collect and classify the data for crop planning and import policy purposes, but also exposes the cultivators to exploitation by the dealers and millers. Instances are not wanting where a better grade of jute is classified arbitrarily as inferior or X-bottom grade by the buyers on one pretext or the other, and an unfair price is paid to the grower. This state of affairs should indeed not be allowed to continue for long and we would strongly recommend that urgent steps be taken to standardise the various grades of jute and mesta on uniform and scientific lines.

8.14. Displaced Persons & Quality of Jute.—We have already referred to the desirability of setting some families of skilled displaced persons in important jute growing areas. The quality of the fibre very much depends on the skill used by the cultivator in retting and extracting it from the plant. People from East Bengal have long experience of growing better quality jute and we were told that wherever displaced persons from East Pakistan have settled in West Bengal or Bihar, the quality of jute has increased considerably. We are conscious of the fact that the settlement of displaced persons involves several considerations; but if this point is also kept in view by the authorities, who ultimately arrange for the re-settlement of these persons, it would serve the cause of the country better.

8.15. Premium for Good Quality Jute.—At present, the premium being paid for good quality jute is so low as to work more as a disincentive than as an incentive to the grower. We were informed that the average cultivator feels that it is not worthwhile to take extra care for improvement of the quality of fibre as the price differential between the superior and the inferior grades of jute is not worth the extra effort required for improving the quality. This state of affairs is due partly to the absence of proper standardization and grading of raw jute and needs to be looked into.

8.16. Cooperative Marketing Societies.—We have already referred to the monopsonistic exploitation of the growers of raw-jute by the buyers because of the low bargaining position of the farmer. We feel that the establishment of co-operative marketing societies should go a long way in securing to the growers a fair price for their produce. The establishment of such Societies will also cure a number of other draw-backs from which the growers of raw jute suffer in marketing their produce.

8.17. Retting Water Facilities.—The quality of the fibre is again dependent to a large extent on the retting water facilities. Nothing is better for retting than the natural clean and slow moving water and one of the reasons why East Pakistan is growing good quality jute is because of the presence of abundant natural water facilities there. Flowing water, especially of the Brahmputra, is clean and is ideal for the production of good quality jute. On the other hand tank water soon gets muddy and sometimes contains a high degree of salts which spoil the colour and quality of the fibre. We have already pointed out earlier the need for ascertaining the areas where natural clean and slow moving water is available so that efforts may be concentrated in such areas. In this context the possibility of using the waters of the canals of Damodar Valley, Mayurakshi, Hirakud and such other projects for retting jute may be explored. We understand that some of these canals are not used for irrigation purposes during the period when jute is usually retted. We appreciate, however, that our suggestion can be carried out only if jute or mesta is grown in the neighbourhood of these canals. In other areas where the fibre grown is strong and of good quality, provision of retting tanks is individually the most important factor which would improve the colour and quality of the fibre. The need for conducting some research for improving the quality of the tank water is also great in this context. Though we have referred to these problems in earlier chapters, they are so crucial that we would like to emphasise their importance and urgency once again.

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CHAPTER IX

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

1. The total requirements of jute and mesta during the First Plan period 1951-52 to 1955-56 varied widely but on the whole the consumption requirements of raw jute and mesta increased by about 40% during the First Plan period. The total requirements of raw jute and mesta in 1955-56 amounted to 70.9 lakh bales. (Para 2.2).

2. The word export demand for jute goods during the Second Plan period is expected to go up by about 15 to 20% over that of 1955-56. India has kept pace with the rate of increase in the world trade since 1950-51. Though the word markets have become increasingly competitive and Pakistan is coming up as India's keen competitor our share in the world trade during the Second Plan period may not decrease. We, therefore, think that our exports of jute goods in 1960-61 would increase at least by about 15% over those in 1955-56. (Para 2.5).

3. In view of the increase in population and rise in the standard of living which is expected to take place during the Second Plan period, the internal consumption of jute goods is likely to increase by at least 25% by 1960-61 as compared to 1955-56 (Para 2.6).

4. Assuming that the domestic consumption of raw jute remain the same *i.e.* 2.3 lakh bales, during the Second Plan period, the total consumption requirement of raw jute and mesta at the end of 1960-61 may be of the order of 80 lakh bales. Allowing for the likely increase in stocks of raw jute and jute goods during the Second Plan period, the total requirements of raw jute may be assumed at 82 lakh bales. (Para 2.8).

5. On the basis of the data available at present it is not possible to work out variety-wise requirements of raw jute and mesta during the Second Plan period. Roughly, however, the break-up of the future requirements of different varieties of the fibre may be taken as 50% white jute, 25% mesta, 15% tossa jute and 10% cuttings. (Para 2.13).

6. Requirements of the various grades of the fibre during the Second Plan period may be taken as 34% middles, 54% bottoms and 12% X-bottoms. (Para 2.15).

7. For manufacturing Bright Hessian for U.S.A. markets about 50,000 to 1 lakh bales of superior Jat variety of jute are required. This variety of Jute is not being produced in the country at present in any appreciable quantity. (Para 2.17).

8. The target of jute production has been fixed at 55.4 lakh bales in the Second Five Year Plan. No target of mesta production has, however, been fixed. Judging from the rate at which mesta production has been increasing in recent years, we think that the total production of mesta by the end of 1960-61 would at least be about 20 lakh bales. The total internal supply of jute and mesta would thus be about 75.4 lakh bales at the end of the Second Plan period. (Para 3.5).

9. Though no regular data are collected at present about the variety-wise production of raw jute, the information received from the State Governments shows that the total production of jute (excluding mesta) roughly about 70% is white jute and 30% is tossa jute. (Para 3.8).

10. The tentative consumption demand and supply position of raw jute during the Second Plan period shows that the country would be short of about 4.4 lakh bales of raw jute at the end of 1960-61. Of this the shortage of white jute would be about 1.2 lakh bales while that of tossa jute and cuttings would be about 3.2 lakh bales. Allowing for the increase in the stocks of raw jute and jute-goods (in terms of raw jute) with the mills which is likely to take place during the coming years, the over-all deficiency of the fibre at the end of 1960-61 may be estimated at about 6.4 lakh bales. (Para 3.9).

11. The deficiency of raw jute and mesta according to various grades may be broadly indicated by the imports from Pakistan. Of the white jute imported from Pakistan about 25% is of middle grade, 60% is of bottom grade and 15% is of X-bottom grade. About 80% of the cuttings imported from Pakistan are of white jute while the remaining 20% are of tossa jute. Our basic deficiency is thus of better grades of white jute *viz.*, tops and middles. (Para 3.12).

12. There is no doubt about the fact that the country can produce almost all the good quality jute required for maintaining our competitive position in world markets, except perhaps the Jat variety of White Jute, a small quantity of which—about 50 thousand to one lakh bales—is required for manufacturing Bright Hessian for U.S. markets. (Para 3.13).

13. For meeting the deficiency in the supply of the fibre it does not seem advisable to continue to rely on imports from Pakistan to any large extent. (Para 3.15).

14. To be self-sufficient in the supply of the fibre it is necessary to increase the internal production during the Second Five Year Plan period. There may be little scope for increasing further the target of production of jute which has already been raised from 50 lakh bales to 55.4 lakh bales. We have, therefore, to look mainly to the increase in the production of the substitute for jute *i.e.*, mesta for meeting the deficiency. (Para 3:16).

15. Every effort should be made to achieve the plan target of raw jute and to ensure that as large a proportion as possible of this is quality jute specially white jute of superior grades. There are certain areas which are already growing good quality jute and it is in these areas that efforts should be concentrated in future for increasing the production. It has not been possible for us to compile a comprehensive list of such areas but an illustrative list of these areas is given. (Para 3.18).

16. In areas where natural supply of slow-flowing good retting water is available the State Government should try to supply better seeds, fertilizers and encourage adoption of improved techniques such as line-sowing, wheel-hoeing, better retting techniques etc. Such areas may to some extent be available also in the neighbourhood of canals in Damodar Valley and Mayurakshi Projects areas in West Bengal. If timely irrigation is made available, it is possible to increase the acreage under jute from the existing 1 lakh acres to about 2 lakh acres in the D.V.C. zone. In the Mayurakshi

Project areas, if adequate amount of irrigation water is made available from April to July, the jute acreage can be increased considerably in Murshidabad, Burdwan and Birbhum districts. (Paras 3.19 and 3.20).

17. In those areas where the fibre grown is good and strong but retting water facilities are not adequate the primary work should be to renovate the existing retting tanks as well as to dig more tanks. (Para 3.21).

18. We feel that the Indian Central Jute Committee should investigate the complaint that water in the retting tanks gets spoilt after some jute has been steeped into it and subsequent steepings affect the colour and quality of the fibre. Research should be conducted in the matter and some chemical, biological or other process for improving the quality of the water in tanks, may be found out. (Para 3.24).

19. Since our efforts in the coming years would have to be confined to increasing the yield per acre in areas where good quality jute is already being grown, it is desirable, in our view, for the State Governments to undertake a detailed survey of the jute growing areas in their States. The Soil Survey recommended by the Expert Committee on the quality of Jute should be completed as early as possible. (Para 3.25).

20. There are ome possibilities in Assam, Orissa and U.P. for bringing in more area under jute without affecting the production of paddy. We suggest these possibilities may be explored by the State Governments. (Para 3.26).

21. The imports of raw jute in recent years has been of the order of about 14 to 15 lakh bales, these are mainly of those varieties which are already produced in India. Of the total imports from Pakistan about 60% are cuttings, 30% long jute and 10% Habi-jabis. (Para 4.5 and 4.6).

22. Of the expected deficiency of the fibre during the Second Plan period we feel that the basic shortage may be only in respect of Jat variety of white jute which at the most may be estimated at about 2 lakh bales. The balance of the deficiency, which should vary from year to year, may be met by imports of cuttings, preferably of superior grades of jutes. Barring these varieties, namely, jat variety of white jute and cuttings, no other variety of jute should in our view, be allowed to be imported. Inferior varieties of jute in particular should not be allowed to be imported. (Para 4.9).

23. We feel that staggering of imports is necessary for protecting the interests of the cultivators. In our view, the issue of import licences should be regulated in such a manner that the requisite quantity of long white jute *viz.*, 2 lakh bales is imported largely during the months of July, August and September. During the same period a small quota of cuttings, say 2 lakh bales, may also be allowed. The balance of the import requirements of cuttings in a year may be allowed to be imported only after December. (Para 4.10).

24. We suggest that, in future, import policy of raw jute should be decided every season by the Ministry of Commerce and Industry in consultation with the Ministry of Food and Agriculture once in July for the interim quota and again in September/October for the final quota in the light of supply position. (Para 4.12).

25. In order to enable the Government to make a proper assessment of the demand and supply position every year we consider it very necessary that variety-wise and, if possible, grade-wise production figures of jute and mesta should be collected on a regular basis. Similarly, the Jute Controller should maintain details of the variety-wise and grade-wise imports of jute and cuttings from Pakistan. It is also desirable to ask the mills to classify their stocks of jute into different grades. (Para 4.13).

26. While there is every reason to be watchful about India's competitive position in world markets particularly because of Pakistan's emergence as a formidable competitor in jute goods, we feel that there is no special reason at present to get alarmed at the admixture of mesta in the production of jute manufactures. We are inclined to agree with the view of the trade that the mill industry will be able to take care of the requirements of the foreign markets and the question of admixture of mesta with jute and the extent to which it should be done, should better be left to it. (Para 5.7).

27. The sacking manufactured by certain Indian mills suffer from some draw-backs and are sold at a small discount in world markets. These defects are not due to the admixture of mesta but are primarily due to a number of manufacturing defects viz., lack of uniform weaving, bad seeming and under-weight. We feel that the Government should watch the situation and if the voluntary efforts of the Indian Jute Mills Association do not succeed, steps should be taken to ensure the quality of our sackings. (Para 5.9).

28. We feel that it is not necessary to regulate the production of mesta in general. On the other hand, it appears desirable and necessary to give more attention to the production of mesta than has been done hitherto especially in areas other than West Bengal. It is also desirable to fix a separate target of mesta production. (Para 5.10).

29. The problem of replacement of jute by mesta, however, deserves consideration. This problem at present can be said to have assumed some significance in West Bengal. We are already short of jute and any encroachment of mesta on jute land should not ordinarily be encouraged. (Para 5.11).

30. The State Governments should encourage the production of mesta in those areas where the question of replacement of either paddy or jute does not arise. An illustrative list of such areas has been given by us but a complete list will have to be prepared by each State Government separately. (Para 5.12).

31. If the quality of Bimli grown in Andhra Pradesh can be improved by better retting techniques control of plant diseases etc., its production, in our view, may be further encouraged in the State of Andhra, particularly in Visakhapatnam, Srikakulam and Guntur areas. (Para 5.13).

32. As the transpourt cost to Calcutta from Mysore and Madras is high it will serve little purpose in increasing further the production of Bimlipatam jute in these States unless the mill industry expands there. (Para 5.14).

33. The production of mesta in Madhya Pradesh and Bombay can be increased only in those areas from where the fibre can be conveniently and economically transported to Calcutta. Any large scale production of mesta in these States does not seem to us to be economically feasible or desirable. (Para 5.15).

34. Adequate plant protection measures must be taken to protect *Hibiscus Cannabinus,* a variety of mesta, which is more susceptible to plant diseases. The Indian Central Jute Committee should intensify their plant protection measures for protecting the *Hibiscus Cannabinus* variety of Mesta from plant diseases and side by side improve the quality and strength of *Hibiscus Sabdariffa* variety of Mesta. (Para 5:16).

35. We feel that the problem of jute prices is fundamental to the question of increasing the production and improving the quality of raw jute produced in the country. (Para 6.1).

36. For the fixation of minimum price of jute all the three criteria, *viz.,* the cost of production of jute, the parity between prices of jute and paddy and the relationship between the prices of raw jute and jute goods need to be considered. (Para 6.7).

37. As far as the cost of production factor is concerned we think that the minimum price should cover the cost of production of jute in West Bengal as the bulk of jute is grown in this State and it is also proximate to the main consuming centre, Calcutta. (Para 6.9).

38. The reasonable parity between the prices of jute and paddy would, according to our calculations, be 2.7 to 1 or in other words 1.8 to 1 between jute and rice. (Para 6.11).

39. The fair price indicated by the Jute Enquiry Commission on the basis of relationship between raw jute and jute goods prices was, in our view, an under-estimate to the extent of Rs. 4 to Rs. 6. The industry has in fact, been paying a higher price of raw jute, than indicated by the Jute Enquiry Commission's formula, and has been able to export more jute goods in recent years. (Para 6.16).

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40. Besides the three main factors to be taken into account of determining the minimum price of jute to be guaranteed to the growers, the cost of transport from the up-country centres in a State to the main consuming centre Calcutta will also have to be considered and adjustments made accordingly. (Para 6.19).

41. In our view the mere announcement of the minimum prices should tone up the market and keep prices well above the minimum. In practice therefore, the possibility of the Government being required to enter into the market for supporting the price is not likely to arise in the present circumstances. (Para 6.21).

42. The most effective method of supporting prices is through 'Buffer Stock Operations'. In case, it becomes necessary for the Government to support prices and a buffer stock is built up, we think that not more than 2% of the raw jute and mesta will have to be bought by the Government at any time. This will require a working capital of about Rs. 2 crores. (Para 6.22).

43. There is very little possibility of incurring a loss in 'Buffer Stock Operations'. Even if some loss is incurred by way of storage charges, administrative expenses, wastage etc., the amount involved is unlikely to be more than Rs. 4 lakhs. This is not a large amount and can be treated as subsidy by the Government to the grower of jute. (Para 6.22).

44. The work relating to buffer stock operations can also be entrusted to a Cooperative Marketing Board or a Marketing Organisation of Trade or of Mills. The State can exercise supervision over such a body and if need arises may make good the loss it may suffer in the process. (Para 6.23).

45. An indirect method of ensuring minimum price is to lay down a Buying Programme for the Mills. In our view voluntary efforts of the Indian Jute Mills Association would serve this purpose and it may not be necessary for the Government to prescribe a buying programme statutorily. (Para 6.24).

46. If for various reasons it is not found feasible by the Government to fix statutorily minimum prices of jute, it is necessary, in our view, to calculate the minimum price every season and keep it in view so that if market prices fall below the minimum the Government may take one or more of the measures suggested by us. (Para 6.25).

47. We feel that if minimum price for rice is fixed in pursuance of the Government's announcement dated the 14th June, 1957, the fixation of minimum price for jute at a corresponding parity may become necessary. (Para 6.25).

48. The tendency of the mills to keep away from the market in India during the beginning of the season and to play between Indian and Pakistani markets in their own interest is borne out, to some extent, by the figures of purchases of raw jute by mills and stocks of raw jute with them. (Paras 7.2 and 7·3).

49. The reasonable level of stocks of raw jute to be maintained by mills should, in our view, be about 3 months requirements *i.e.*, roughly about 15 lakh bales while the maximum stocks to be held at any particular time might be about 4 to 5 months' requirements. (Para 7.5).

50. In our view the tendency of the mills to keep away from the market at a time which is crucial to the cultivator is undesirable We feel that about 2 to 3 months stocks, *i.e.*, roughly 10 to 15 lakh bales, ought to be built up by mills, particularly during the first five months of the season *i.e.*, from July to November when most of the produce is marketed by our cultivators. (Para 7.6).

51. The long-term and more permanent solution of the problem of price support would be provided only by setting up a Government organisation or Co-operative Marketing Organisation which would buy jute from the cultivators at a reasonable rate at the harvest season and sell to the mills later at a competitive price. (Para 7.8).

52. We feel that it will be useful to popularise the use of Tamadind-water treatment of raw jute for improving the colour of shyamla jute grown in some parts of the country. This should, however, be done only when it is proved by research that the strength of the fibre is not weakened by the tamarind-water treatment. To begin with, this process may be tried in a few areas which grow *shyamla* jute. It will be useful if a pamphlet is prepared by the Indian Central Jute Committee giving the details of the Tamarind process and its advantages which may be distributed widely amongst cultivators growing *shyamla* or dark colour jute. (Para 8.3).

53. In our view the Ministry of Commerce and Industry should take up with the U.S. authorities the question of charging a higher import duty by U.S. on Hessian prepared out of bleached jute. It seems to involve unfair discrimination. In any case the tamarind water process should not be regarded as chemical treatment of the fabric and the goods prepared out of such jute should not be subjected to a higher customs duty. (Para 8.4).

54. Intensive cultivation of jute should be achieved by better manuring, improved seeds, improved cultural practices, control of pests and diseases. The efforts in this direction should be accelerated as much as possible. (Paras 8.5 & 8.6).

55. Top-dressing of jute, which offers the best potentialities for the increase in production, should be taken up in right earnest by the State Governments. (Para 8.7).

56. The State Governments may utilize the help offered by the Indian Jute Mills Association and other jute interests for distributing pamphlets and popularising the use of fertilizers amongst cultivators. (Para 8.8).

57. Attempts should be made to procure adequate number of seed drills and wheel-hoes and distribute them to the cultivators as widely as possible. (Para 8.9).

58. In our view there is urgent need for intensifying plant protection measures for saving the huge loss which is caused by plant pests and diseases. (Para 8.10).

59. We suggest that the possibilities of setting up cooperative jute pressing and baling machines in producing centres should be explored so that the cultivator is able to get a better price of his produce. (Para 8.12).

60. We can hardly over-emphasise the urgent need for proper grading and standardization of raw jute and mesta in order to protect the cultivators from exploitation by traders and middlemen. (Para 8.13).

61. The displaced persons from East Pakistan have long experience of growing better quality jute and they know better retting techniques. We feel that if the displaced skilled persons are rehabilitated in important jute growing areas the quality of our jute will improve considerably. (Para 8.15).

62. The apathy on the part of the cultivators to improve the quality of the fibre is partly due to the fact that the premium paid for better grades of the fibre is not commensurate with the time and labour involved. This state of affairs needs to be remedied. (Para 8.15).

63. We would suggest the establishment of Cooperative Marketing Societies which should go a long way in securing to the growers a fair price for their produce. (Para 8.16).

64. The importance of abundant supply of retting water for improving the quality of fibre is supreme. Every attempt should be made to renovate the existing retting tanks as well as to provide more retting tanks in important jute growing areas. (Para 8.17).

S. R. SEN, *Chairman.*
S. A. TECKCHANDANI*
A. P. MATHUR*
K. N. AGHA
K. C. BASAK

S. B. L. NIGAM, *Member Secretary.*

NEW DELHI;
The 6th July, 1957.

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*Signed subject to the minute of dissent appended.

MINUTE OF DISSENT BY SARVASHRI S. A. TECKCHANDANI AND A. P. MATHUR.

We consider that it would not be appropriate to discuss the question of fixing minimum prices for raw jute in this report. The reasons are as follows:—

(i) The question regarding fair prices was fully considered by the Jute Enquiry Commission in 1954, and their recommendation was that it would not be proper to fix a minimum price for raw jute because statutory price control would be undesirable for an industry which sells more than 80 per cent of its production in overseas markets where it has to face growing competition. This recommendation was accepted by Government.

(ii) The question of fixing reasonable prices of agricultural products has again been considered only recently, and the decision taken has been announced in the press note of the Ministry of Food and Agriculture issued on the 14th June, 1957[1]. It is clearly stated in that Press Note that, when prices are running high as they are at present, it is not necessary to fix and announce economic prices for agricultural products. This decision applies to jute also.

2. Having discussed threadbare the question of minimum prices of jute twice recently and taken the decision not to fix any economic price for jute, we do not think it necessary to go over this matter again. We believe that the Government decision incorporated in the Resolution dealing with the recommendations of the Jute Enquiry Commission fully explains the Government attitude towards this matter. We believe that establishment of multipurpose cooperative societies of jute farmers and other measures like the distribution of better seeds and manures, employment of improved agricultural methods, better retting facilities, etc., will go a long way towards increasing the production of jute and improving its quality rather than fixation of minimum prices which is neither desirable nor practicable.

S. A. TECKCHANDANI

A. P. MATHUR

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[1] (For full text of the Press Note please *see* Appendix A-I.)

APPENDIX A-I

Copy of Press Note No. 11.05/6442, dated 14-6-57 issued by the Government of India.

GOVERNMENT'S ASSURANCE ON AGRICULTURAL PRICES

The question of fixing reasonable and economic prices for agricultural products has been engaging the attention of the Government for some time. When prices are running high, as they are at present, it is not necessary to fix and announce economic prices for agricultural products.

The Government are conscious of the fact that the bulk of the people of the country are agriculturists and on their well-being depends the prosperity of the country. The Government, therefore, would like to assure the agriculturists that the prices of foodgrains and other agricultural commodities would not be allowed to fall below economic levels. They will take suitable steps from time to time to achieve this end.

APPENDIX A-II

Copy of Ministry of Agriculture (I.C.A.R.) Office Memo No. F. 5-16/57-Com. II, dated the 7th March 1957.

No. F.5-16/57-Com.II

GOVERNMENT OF INDIA

MINISTRY OF AGRICULTURE (I.C.A.R.)

New Delhi, dated the 7th March, 1957

OFFICE MEMORANDUM

The Conference on Promotion of Jute Production held on the 12th January, 1957, recommended that a Sub-Committee should be set up to consider *inter-alia,* the question of requirements of jute and mesta by the Indian jute mills. The Government of India have accepted the recommendation of the Conference and have decided to constitute a Sub-Committee of the following:—

1. Dr. S. R. Sen, Economic and Statistical Adviser, Ministry of Agriculture—*Chairman.*
2. Shri S. A. Tekchandani, Deputy Secretary, Ministry of Commerce and Consumer Industries,
3. Shri A. P. Mathur, Joint Chief Controller, Exports and Imports and Jute Controller, Ministry of Commerce and Consumer Industries,
4. Shri K. N. Agha, Secretary, Indian Central Jute Committee,
5. Shri K. C. Basak, Director, Economic Research, Indian Central Jute Committee,
6. Shri J. S. Sarma, Deputy Economic and Statistical Adviser, Ministry of Agriculture.—*Convener.*

The terms of reference of the Sub-Committee will be as under:—

1. To consider the requirements of the jute mills in respect of the various qualities of jute and mesta;
2. to assess the extent of availability of various qualities of jute and mesta in India, including the stocks with mills;
3. to determine the quantum of raw jute to be imported from Pakistan and to examine the possibility of stopping or staggering imports from Pakistan of those varieties of raw jute, of which there is enough production in India;
4. to consider as to what extent the Indian jute mills should be allowed stock-piling and have carry-over stocks; and
5. to work out and recommend the proportions in which mesta and jute should be grown particularly whether and how far the growth of mesta should be encouraged in any specified parts of the country.

It has been decided that the Sub-Committee should meet immediately and submit its report to the Government of India as quickly as possible.

(Sd.) S. K. MIRCHANDANI,
Deputy Secretary to the Govt. of India.

APPENDIX A-III

Copy of Ministry of Food and Agriculture (I.C.A.R.) (Deptt. of Agriculture) Memo No. F. 5-16/57-Com. II, dated the 25th May 1957.

No. F. 5-16/57-Com. II.

GOVERNMENT OF INDIA

MINISTRY OF FOOD AND AGRICULTURE (I.C.A.R.)

(Department of Agriculture)

New Delhi, dated the 25th May, 1957

MEMORANDUM

Reference late Ministry of Agriculture (ICAR) Office Memorandum No. 5-16/57-Com. II, dated the 7th March, 1957.

It has been decided to appoint Dr. S. B. L. Nigam, Assistant Economic and Statistical Adviser, Ministry of Food and Agriculture in place of Shri J. S. Sarma, Deputy Economic and Statistical Adviser to the said Ministry, on the Sub-Committee set up to consider *inter alia,* the question of requirements of jute and mesta by the Indian jute mills. Dr. Nigam will be Member-Secretary of the Sub-Committee.

Further, the said Sub-Committee shall hereafter be called as 'Committee'.

(Sd.) MOKAND LAL,

Under Secretary to the Govt. of India.

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APPENDIX A-IV

Gist of Interim Recommendations of the Committee made by its Chairman at the Meeting of the State Government Representatives held at Calcutta under the Chairmanship of the Vice-President and Additional Secretary, I.C.A.R. on 18th April 1957.

The Committee appointed by the Ministry of Agriculture to consider *inter alia*, the requirements and availability of raw jute and mesta during the Second Plan period and the measures which should be taken by the Government to step up the production of those varieties of jute which are imported at present, had discussions with the Chairman and other representatives of the Indian Jute Mills Association and the representatives of the Jute Balers Association, Jute Fabric Shippers Association, Gunny Traders Association, Jute Dealers Association and Jute Sellers Association. It was generally recognised that there were two aspects of the problem: long-term aspect and the short-term aspect. The long-term aspect requires the consideration of measures which should be taken for improving the yield and quality of the raw jute which the industry will require during the Second Plan period while for the short-term aspect we have to consider measures which should be taken immediately for stepping up production as much as possible, during the current season, so as to minimise imports from Pakistan on account of the serious foreign exchange difficulties which the country is experiencing at present.

The Committee is continuing its deliberations and will report to the Government of India on the long-term measures as early as possible. In view of the urgency of the short-term measures which must be taken almost immediately, the Committee considered this aspect in particular and would like to make the following suggestions for the consideration of the representatives of the State Governments who are present at this meeting:

(1) As the sowings of jute have taken place in some areas while in other areas they will be completed soon, the only effective measure that can be taken by the Government now to step up the production during the current season is to supply and popularise the use of fertilizers amongst the cultivators. It is not yet too late to rush the supply of fertilizers to important jute growing areas.

(2) The crop in the fields, where it has already been sown, is at present about 4 inches in length and there is still time of about 6 to 8 weeks for arranging the supply and distribution of fertilizers to the cultivators. The Committee feels that the State Governments should take immediate measures to rush supplies of fertilizers to various important jute growing areas if not already done so. The distribution programme should be so drawn up by the State Governments as to ensure the supply of fertilizers within this period of 6 to 8 weeks.

(3) The use of fertilizers by the cultivators requires two things:

(i) publicity amongst the cultivators about the advantages and desirability of using fertilizers in right quantity and right manner: and

(ii) proper and quick distribution of fertilizers to the cultivators.

As far as the publicity aspect is concerned, the Chairman of the Indian Jute Mills Association and the representatives of other jute interests, whom the Committee interviewed have been good enough to offer their help and services to the Government. The IJMA is prepared to publish pamphlets and leaflets at their own cost for the information of cultivators on the use and need of fertilizers. The other jute interests *viz*. the Jute Dealers' Association, the Jute Balers' Association and the Jute Sellers' Association have also offered their services for distributing the pamphlets through their various agencies in the upcountry areas to the cultivators if these could be made available to them by the Government. The Committee feels that the State Government may utilise the help offered by the IJMA and other jute interests. In order that this help may be effective, it is necessary that a list of the State depots where fertilizers are stored and from where cultivators can obtain their supplies, should be supplied to the IJMA and other jute interests mentioned above so that they may arrange the distribution of the pamphlets and leaflets accordingly. We feel that a list of such depots should be immediately drawn up by the State Governments concerned and supplied to the Indian Central Jute Committee which will pass on the information to the IJMA and other jute interests.

(4) Besides the help offered by the Jute interests in popularising the use of fertilizers, the Committee feels that it would be of great advantage if the State Governments could also print and distribute some informative literature to the cultivators on the use of fertilizers. From the discussions the Committee had with the various jute interests, it is convinced that care and skill put in by the cultivators in using fertilizers, and in retting of jute determines largely the yield and quality of the jute produced. If the cultivator is educated by the Government through the informative literature and other publicity measures, our drive for the production of better quality of jute as well as higher yield would receive great impetus.

(5) The importance of availability of abundant retting water for the improvement of the quality of jute produced can hardly be over-emphasised. The State Governments should give their utmost attention to the provision of retting tanks in areas which produce good jute. The State Governments may also try to ascertain areas where supply of abundant natural water is available so that efforts may be intensified in those areas for producing good quality jute.

(6) Distribution of fertilizers at the right time and in right manner is also very important. It has been represented to the Committee that if the State Government officials and jute development staff undertake extensive tours and exercise supervision over distribution of fertilisers from the various depots during the next few months, it would produce significant results. We would suggest, therefore, that State officials should undertake extensive tours and supervise the distribution of fertilizers. If necessary, the number of fertilizers depots in the States may be increased.

(7) The IJMA and other jute interests urged that if the supply of fertilizers is entrusted to private agencies it will ensure quick distribution. We were told that some of the State Governments are already utilising the services of private agency houses for distributing fertilisers to the cultivators. The other State Governments may like to consider this suggestion if they feel that fertilizer depots in their States are not sufficient to ensure prompt and quick supply.

APPENDIX A-V

Note received from the Director, Jute Agricultural Research Institute, Indian Central Jute Committee, Calcutta, regarding Tamarind-water Treatment of Shyamla Jute.

REMOVAL OF SHYAMLA COLOUR OF JUTE FIBRE

Jute fibre from certain jute growing areas is coloured blackish and is known as Shymla jute in trade. The cause of this colouration is due to the presence of tannin in jute plants and of iron in retting water. The tannin of the plants coming in contact with the iron of the retting water imparts this *Shyamla* (steel-grey) colour to the fibre.

When the jute bundles or 'jaks' are weighted down in the retting water by means of banana stems, freshly cut mango logs etc. (which are rich in tannin) and clods of earth, the fibres get coloured. When repeated steepings are done in the same tank, the fibres from the later charges become coloured due to accumulation of tannin and iron in the water. Due to this colour, lower price is obtained for such fibres. This colour can be removed by treatments with acid. It has been found that of the acids or acidic substances, tamarind extract gives the best result taking into consideration the cost involved and the quality of fibre produced.

Materials required for the process:

(1) Fresh Tamarind—5 srs.

(2) One Earthenware pot to hold about 5 to 10 seers water (Hereinafter called "Pot").

(3) Three Earthenware Vats to hold about one maund of water.

(4) One piece of cloth for straining.

Process:

One day previous to extraction of the fibre, 2—5 srs. of the ripe tamarind are placed in the earthen-ware pot and filled with 5-7 srs. of water and stirred for sometime. On the day of extraction, this pot is taken near the retting pool together with the three 'Vats' and in one of these the tamarind extract is carefully filtered by passing it through the cloth. This Vat (Vat No. 1) containing filtered tamarind extract is then filled with 30 seers of clean water. The whole liquid is then stirred for some time to make it uniform. The undissolved portions of tamarind are put back into the 'pot' and filled with clean water again. The other 2 Vats are also filled with clean water (Vat Nos. 2 & 3). Immediately after extraction and washing, *Shyamla* coloured fibre (before drying) is dipped in the Vat No. 1 (containing tamarind extract) and stirred. The removal of the colour can easily be seen. As soon as the colour is removed; which usually takes not more than 5 minutes time; the fibre bundle is squeezed to remove the tamarind extract as far as possible. Then the fibre bundle is dipped into Vat No. 2 (containing clean water) and allowed to stand for a few minutes. The fibre is washed in this Vat by movement of the bundle up and down for seven or eight times. The fibre bundle is squeezed again and put in Vat No. 3 (containing clean water also). After some time the fibre bundle is washed again in the Vat similarly, and finally taken for drying. The process may be continued and when it is observed that the colour is not removed by dipping fibre any further in Vat No. 1, fresh tamarind extract will be necessary in this Vat.

When the volume of water in Vat No. 1 (containing tamarind extract) will go down, it should be filled up with water from earthenware pot where already clean water was added to undissolved tamarind. To this "pot" water is again added from Vat No. 2 and stirred. When it is necessary to add water to Vat. No. 2, it is taken from Vat No. 3. To Vat No. 3 only clean water is to be added always.

Whenever already dried *shyamla* coloured fibre is to be treated the time of removal and the quantity of tamarind required may be much more depending mainly on the age of the dried *shyamla* coloured fibre, as also, to some extent on the age of the tamarind used. The time required may sometimes range from about 3 to 4 hours. Somewhat better results are obtained if this dried *shyamla* coloured fibres are soaked in water before the treatment is started.

Green tamarind can also remove the colour, but it reduces the strength of the fibre. If the tamarind is old, quantity of tamarind required is more and this is dependent on the condition of its storage and its age and often the quantity required is 3-4 times the quantity of fresh ripe tamarind.

Technological tests have revealed that the quality ratio is slightly improved by this treatment.

Pilot scale studies have shown that normally two persons should be able to treat about 8 maunds of fibre with 5-8 srs. of tamarind. The operation would cost about annas ten (62 np.) or even less per maund of fibre including the cost of labour @ Rs. 1-10-0 (162 np.) per day.

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APPENDIX A-VI

Areas Growing Good Quality White Jute

Sl. No.	Centre	District	Remarks
		ASSAM	
1	Balajan	Goalpara	Good-leafy.
2	Bilashipara	,,	—
3	Chapar	,,	Good.
4	Dhubri	,,	,,
5	Gourepore	,,	,,
6	Golakganj	,,	—
7	Tipkai	,,	Good.
8	Basugaon	,,	Good leafy.
9	Bongaigaon	,,	Good.
10	Fakirgram	,,	—
11	Kokrajhar	,,	—
12	Putimari	,,	Good.
13	Saptgram	,,	,,
14	Mankachar	,,	(Strong fibre)
15	Goalpara	,,	,,
16	Kholabanda	Kamrup	Medium.
17	Barpeta	,,	,,
18	Palashbari	,,	Fairly Good.
19	Tarabari	,,	—
20	Goreswar	,,	—
21	Halvari	,,	—
22	Pathshala	,,	Good.
23	Rangia	,,	,,
24	Sorphog	,,	Medium.
25	Sorupeta	,,	,,
26	Ballikattia	Nowgong	Good.
27	Champarmukh	,,	,,
28	Doom Doomingaon	,,	,,
29	Jojai	,,	,,
30	Haibargaon	,,	,,
31	Jamunarumkh	,,	,,
32	Jhuriagaon	,,	,,
33	Nowgong	,,	,,
34	Puranigudam	,,	,,
35	Raha	,,	,,
36	Ruphaigaon	,,	,,
37	Shamaguri	,,	,,

Sl. No.	Centre	District	Remarks
	ASSAM –*contd.*		
38	Dhingbazar	Nowgong	(Fibre coarse). Good.
39	Moirabari	,,	,,
40	Kampur	,,	—
41	Authganw	,,	Good.
42	Bardutiaghat	,,	Fairly Good.
43	Tampat	,,	—
44	Kholapota	,,	—
45	Tezpur	,,	Good-Leaf.
	BIHAR		
1	Kishanganj	Purnea	V. G. to Medium.
2	Kanki	,,	,,
3	Arariya	,,	,,
4	Delkhola	,,	Very good.
5	Jalalgarh	,,	Medium.
6	Panjipara	,,	,,
7	Thakurganj	,,	Good, Medium.
8	Garbanaili	,,	,,
9	Forbesganj	,,	,,
10	Golgolia	,,	,,
11	Kathiar	,,	,,
12	Karagola	,,	,,
13	Sonaili	,,	Good.
14	Purnea	,,	,,
15	Nowgachhia	,,	,,
16	Supaul	,,	,,
17	Bhoplai	,,	,,
18	Bhariganj	,,	,,
19	Banmankhi	,,	Fair.
20	Murliganj	,,	,,
21	Barharwa	Santal Pgs.	,,
22	Sahibganj	,,	Good.
23	Baraskelhi	,,	Fair.
24	Bhowanipur	Santal Pgs.	,,
25	Badnapur	,,	,,
26	Bharai	,,	,,
27	Chhatapur	,,	,,
28	Partabpur	Bhagalpur	,,
29	Saharsa	,,	,,
30	Sonwara	,,	,,
31	Nirmali	,,	,,
32	Pirpainti	,,	,,
33	Janjharpur	Darbhanga	Low.
34	Hainagar	—	Good.
35	Sripur	—	,,
36	Sadar	—	,,

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ORISSA

Sl. No.	Centre	District	Remarks
1	Bayru	Cuttack	Good.
2	Bhadrak	Balasore	—
3	Cuttack	Cuttack	Good.
4	Chhatia, Pattnmundei	,,	,,
5	Chitoori, Patkura	—	,,
6	Dharmandal, Salepur	—	,,
7	Damenpur, Mahanga	—	,,
8	Gulbarga, Kesannagar	—	,,
9	Naridaspur, Badchana	—	—
10	Dharmasala	—	Good.
11	Jainapur	—	,,
12	Jahajpur	—	,,
13	Kapilas Rd.	Cuttack	,,
14	Kendrapara	,,	,,
15	Kendupataria	,,	,,
16	Narchcaighai	,,	,,
17	Nargundi	,,	,,
18	Nalguri	,,	,,
19	Balasore	Balasore	,,
20	Anandpur Sub-Division	Keonjhar	—

UTTAR PRADESH

Sl. No.	Centre	District	Remarks
1	Jhandi	Lakhimpur.	
2	Hasanpur-katauli	,,	
3	Kewalpurwa	,,	
4	Laukhia	,,	
5	Kachlaghat	Badaun	
6	Daulatput	Barabanki	
7	Payagpur	Bahraich	
8	Mukhlispur	Basti	
9	Dubaulia	,,	
10	Padrauna	Deoria	
11	Chhitauni	,,	
12	Surajpur	Azamgarh	Medium Good.
13	Nizamabad	,,	
14	Abheypur	Lakhimpur	
15	Tamkohi Road	,,	
16	Golonelganj	Gonda	
17	Mihinpurwa	Bahraich	
18	Ganeshpur	Barabanki	
19	Tambaur	Sitapur	
20	Chahalwa	,,	
21	Seota	,,	

WEST BENGAL

Sl. No.	Centre	District	Remarks
1	Kotowali	Jalpaiguri	Good.
2	Raiganj	,,	,,
3	Belakoba	,,	,,
4	Bhotepatti	,,	,,
5	Barneshbazar	,,	,,
6	Jalpaiguri	,,	,,
7	Lataguri	,,	,,
8	Maynaguri	,,	—
9	Mall Junction	,,	—
10	Mogalhat	,,	—
11	Alipurduar	,,	Fairly Good.
12	Binnaguri	,,	,,
13	Banarhat	,,	Medium.
14	Kamakhyaguri	,,	Medium Leaf.
15	Domohani	,,	Good.
16	Mandalghat	,,	,,
17	Adhikari	,,	Medium
18	Falakata	,,	Good.
19	Patgram	,,	,,
20	Maynaguri	,,	,,
21	Metali	,,	,,
22	Nagarkata	,,	,,
23	Dhupguri	,,	,,
24	Changrabandha	Cooch-Behar	Medium
25	Haldibari	,,	Good.
26	Mathabangha	,,	,,
27	Bamanhat	,,	,,
28	Bhetaguri	,,	,,
29	Cooch-Behar	,,	Medium.
30	Dewanhat	,,	,,
31	Dinhata	,,	Good.
32	Falimari	,,	Medium.
33	Citaldaha	,,	Good.
34	Sadar	,,	,,
35	Mekliganj	,,	,,
36	Tufanganj	,,	,,
37	Siliguri	Darjeeling	,,
38	Phansideva	,,	,,
39	Kharibari	,,	,,

Sl. No.	Centre	District	Remarks
		WEST BENGAL – *contd.*	
40	Begambari	West Dinajpur	Medium.
41	Balurghat	,,	Good.
42	Dalimgaon	,,	,,
43	Hili West	,,	,,
44	Kaliyaganj	,,	,,
45	Raiganj	,,	,,
46	Banshihari	,,	,,
47	Kuslmandi	,,	,,
48	Hemliapad	,,	,,
49	Itahar	,,	,,
50	Gangarampur	,,	,,
51	Tapan	,,	,,
52	Kumarganj	,,	,,
53	Radhikapur	,,	,,
54	Kumedpur	Malda	,,
55	Bhalukaroad	,,	,,
56	Bulbulchandi	,,	,,
57	Harishchandrapur	,,	,,
58	Samsi	,,	,,
59	Balupurhat	,,	,,
60	Gagole	,,	,,
61	Habibpur	,,	,,
62	Bamangola	,,	,,
63	Bhagwangola	Murshidabad	,,
64	Dhuliaganges	,,	,,
65	Islampur	,,	,,
66	Jangipur	,,	,,
67	Jaiganj	,,	,,
68	Krishnapur	,,	,,
69	Lalgola	,,	,,
70	Maharajang	,,	,,
71	Murshidabad	,,	,,
72	Noyapara	,,	,,
73	Nimtita	,,	,,
74	Sakjinipara	,,	,,
75	Beldanga	,,	,,
76	Bhabta	,,	,,
77	Coossimbazar	,,	,,
78	Karimpur	,,	Very Good.
79	Bethuadahari	Nadia	Good.
80	Badkulla	,,	,,
81	Sonadanga	,,	,,
82	Tehata	,,	[illegible]
83	Benagram	,,	,,

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WEST BENGAL—*contd.*

Sl. No.	Centre	District	Remarks
84	Bhubulia	Nadia	Good.
85	Krishnanagar	,,	,,
86	Nabadwip	,,	Medium.
87	Plassey	,,	Good.
88	Pajlachandi	,,	Medium.
89	Chokdah	,,	Good.
90	Bagoola	,,	Fair.
91	Payardanga	,,	Medium.
92	Ranaghat	,,	,,
93	Santipur	,,	Good.
94	Aranghatta	,,	,,
95	Karimpur	,,	Very Good.
96	Tamlor	,,	Good.
97	Majdia	24-Parganas	,,
98	Bongaon	,,	Very Good.
99	Budaria	,,	,,
100	Bairhat	,,	Medium
101	Baraset	,,	,,
102	Chandpara	,,	,,
103	Habra	,,	,,
104	Bishnupur	,,	,,
105	Bhangore	,,	,,
106	Amdanga	,,	,,
107	Chanditala	Hooghly	Good.
108	Triboni	,,	Medium.
109	Sheoraphuli	,,	Very Good.
110	Damjur	Howrah	Good.
111	Mayanoor	Burdwan	,,
112	Purbasthalia	,,	Medium.
113	Midnapore	Midnapore	Good Deshi.
114	Kholaghat	,,	Good.
115	Mayna	,,	,,
116	Bondar	,,	,,
117	Geonkhali	,,	,,
118	Burdwan	Burdwan	,,
119	Birbhum	Birbhum	,,

TRIPURA

Sl. No.	Centre	District	Remarks
1	Agartala	Tripura	Good.
2	Karimganj	,,	,,
3	Khowai Ladia	,,	,,

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APPENDIX A-VII

List of Persons Interviewed by the Committee

	Name of Persons	Organisation
1.	Shri D. P. Geenka	Chairman, Indian Jute Mills Association
2.	Mr. J. I. Jamieson	Indian Jute Mills Association.
3.	Dr. W. G. Macmillan	Director, IJMA Research Institute.
4.	Shri Gashiram Saraf	Bengal Jute Bales Association.
5.	Shri B. N. Mathur	Do.
6.	Shri N. K. Jalan	Jute Fabric Shippers Association.
7.	Shri N. L. Kanoria	Do.
8.	Mr. A. K. Alexion	Do.
9.	Shri H. B. Nimani	Gunny Traders Association.
10.	Shri N. M. Surana	Jute Balers Association.
11.	Shri R. C. Jhawar	Bharat Jute Sellers Association.
12.	Shri H. C. Bokaria	Do.
13.	Mr. T. S. Young	M/S. Landale & Clark Ltd.
14.	Dr. B. C. Kundu	Director, Jute Agri. Research Institute, Indian Central Jute Committee.
15.	Dr. P. B. Sarkar	Director, Jute Technological Institute, ICJC.

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APPENDIX B-I

Area, Production and Yield per Acre of Raw Jute

Area—Thousand acres.
Production—Thousand bales of 400 lbs. each.
Yield—Bales per acre.

States	1939-40	1940-41	1941-42	1942-43	1943-44	1944-45	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56	1956-57(F)
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Assam—																		
Area . . .	281	309	279	256	197	169	155	179	209	218	259	249	334	313	284	282	367	355
Production . .	558	786	593	413	320	267	495	456	536	599	717	790	840	912	902	750	1,212	1,049
Yield per acre .	2·0	2·5	2·1	1·6	1·6	1·6	3·2	2·5	2·6	2.7	2·8	3·2	2·5	2.9	3·2	2·7	3·3	3·0
Bihar—																		
Area . . .	266	282	242	233	202	163	159	145	144	218	305	335	458	431	283	270	353	665
Production . .	709	571	414	340	411	230	274	251	403	457	665	616	898	820	410	374	512	1,380
Yield per acre .	2·7	2·0	1·7	1·5	2.3	1·4	1·7	1·7	2·8	2·1	2·2	1·8	2·0	1·9	1·4	1·4	1·5	2·1
Orissa—																		
Area . . .	22	29	25	24	24	24	20	24	22	36	51	110	161	116	59	87	111	91
Production . .	47	52	59	56	66	49	44	58	44	65	147	242	387	256	129	192	245	183
Yield per acre .	2·1	2·0	2·3	2·3	2·8	2·0	2·2	2·4	2·0	1·8	2·9	2·2	2·4	2·2	2·2	2·2	2·2	2·0

U. P.—																		
Area . . .	...	...	...	...	...	...	...	...	...	...	11	24	68	80	27	34	34	31
Production . .	...	...	...	...	...	...	...	...	...	...	24	49	103	124	56	70	89	89
Yield per acre .	...	...	...	...	...	...	...	...	...	...	2·2	2·0	1·5	1·6	2·1	2·1	2·6	2·9
West Bengal—																		
Area . . .	207	622	220	319	265	214	223	179	266	350	524	674	905	849	560	551	854	720
Production . .	516	1,321	546	796	641	598	621	530	649	907	1,510	1,538	2,389	2,422	1,556	1,496	2,089	1,462
Yield per acre .	2·5	2·1	2·5	2·5	2·4	2·8	2·8	3·0	2·4	2·6	2·9	2·3	2·6	2·9	2·8	2·7	2·4	2·0
Tripura—																		
Area . . .	13	18	17	15	12	10	10	10	11	12	13	19	25	24	15	19	20	21
Production . .	29	43	34	32	25	20	25	25	26	27	26	48	61	58	38	46	50	58
Yield per acre .	2·2	2·4	2·0	2·1	2·1	2·0	2·5	2·5	2·4	2·3	2·0	2·5	2·4	2·4	2·5	2·4	2·5	2·8
Total—																		
Area . . .	789	1,260	783	847	700	580	567	537	652	834	1,163	1,411	1,951	1,813	1,228	1,243	1,739	1,883
Production .	1,859	2,773	1,646	1,637	1,463	1,164	1,459	1,320	1,658	2,055	3,089	3,283	4,678	4,592	3,091	2,928	4,197	4,221
Yield per acre .	2·4	2·2	2·1	1.9	2·1	2·0	2·6	2·5	2·5	2·5	2·7	2·3	2·4	2·5	2·5	2·4	2·4	2·2

F—Final Estimate

N.B.—The information from 1949-50 and onwards relates to the set up of States after their re-organisation on November, 1956.

APPENDIX B-II

Area, Production and Yield per acre of Mesta

State	1952-53	1953-54	1954-55	1955-56	1956-57
1	2	3	4	5	6
Andhra Pradesh					
Area	237	138	179	123	124
Production	394	292	326	270	261
Yield per acre	1·7	2·1	1·8	2·2	2·1
Assam					
Area	3	3	3	5	5
Production	8	9	4	9	11
Yield per acre	2·7	3·0	1·3	1·8	2·2
Bihar					
Area	26	17	31	24*	54*
Production	26	16	40	35*	105*
Yield per acre	1·0	0·9	1·3	1·5	1·9
Bombay					
Area	85	159	90	114	150
Production	83	146	98	109	165
Yield per acre	1·0	0·9	1·1	1·0	1·1
Madhya Pradesh					
Area	46	25	22	25	24
Production	26	21	25	21	19
Yield per acre	0·6	0·8	1·1	0·8	0·8
Madras					
Area	2	4	1	1	1
Production	3	7	2	2	2
Yield per acre	1·5	1·8	2·0	2·0	2·0
Mysore					
Area	41	87	39	63	57
Production	39	87	49	54	55
Yield per acre	1·0	1·0	1·3	0·9	1·0
Orissa					
Area	25	17	21	23	25
Production	50	34	41	45	50
Yield per acre	2·0	2·0	2·0	2·0	2·0
Punjab					
Area	1	1	1	1	1
Production	2	2	2	2	2
Yield per acre	2·0	2·0	2·0	2·0	2·0
West Bengal					
Area	18	12	141	193*	297*
Production	51	36	431	612*	804*
Yield per acre	2·8	3·0	3·2	3·2	2·7
	484	463	528	572	738
	682	650	1,018	1,159	1,474
	1·4	1·4	1·9	2·0	2·0

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ures relate to Re-organised States.

to the set up of States existing before Re-organisation.

APPENDIX B-III

Variety-wise Production of Jute in different States during 1956-57

(Lakh bales of 400 lbs. each.)

States	White					Tossa				
	White	Western White	Northern White	Jungli	Total	Jungli	Daisee	Tossa	Total	Grand Total
Assam	7·67	...	...	...	7·67	...	...	2·82	2·82	10·49
Bihar	...	8·96	1·83	1·40	12·19	Negligible	1·80	0·14	1·94	14·13@
Orissa	1·37	...	...	...	1·37	...	...	0·46	0·46	1·83
U. P.	...	...	0·73	0·09	0·82	...	...	0·05	0·05	0·87
West Bengal* . . .	1·33	0·17	3·51	...	5·01	0·30	2·53	3·42	6·25	11·26
Tripura	0·37	...	...	...	0·37	...	...	0·21	0·21	0·58
TOTAL . . .	10·74	9·13	6·07	1·49	27·43	0·30	4·33	7·10	11·73	39·16

*Exclusive of 3·36 lakh bales of unclassified jute.

@Provisional.

N. B.—Tentative Information received from different States.

APPENDIX B-IV

Grade Outturn of Jute during 1954-55 and 1955-56

(In percentage)

State	Grade	Variety			
		White		Tossa	
		1954-55	1955-56	1954-55	1955-56
(1)	(2)	(3)	(4)	(5)	(6)
Assam . .	Top	0·25	0·60	—	—
	Middle	6·68	7·98	5·81	3·06
	Bottom	60·80	56·38	78·04	35·54
	B-Bottom	24·42	22·18	14·09	36·50
	X-Bottom	7·85	12·86	2·06	24·90
Bihar . .	Top	1·41	2·78	—	3·23
	Middle	31·86	11·02	58·91	13·87
	Bottom	53·38	52·76	34·64	49·92
	X-Bottom	13·37	33·44	6·45	32·98
Orissa . .	Top	—	0·15	—	—
	Middle	8·74	8·20	28·53	18·85
	Bottom	78·57	78·52	66·24	76·00
	X-Bottom	12·69	13·13	5·23	5·15
U.P.	Top	—	0·07	—	
	Middle	27·22	37·89	—	69·55
	Bottom	49·59	43·01	—	24·17
	X-Bottom	23·19	19·03	—	6·28
West Bengal .	Top	12·20	4·02	—	—
	Middle	33·31	23·28	30·00	25·66
	Bottom	39·58	47·29	60·00	51·32
	X-Bottom	14·91	25·41	10·00	23·02

N. B.—Based on *Ad-hoc* surveys by the Jute Grading party of the Indian Central Jute Committee.

APPENDIX B-V

Arrivals of Raw Jute at Calcutta and other Mill Stations

(Thousand bales of 400 lbs. each)

Month	1950-51			1951-52			1952-53			1953-54			1954-55			1955-56			1956-57		
	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)
July . .	44	248	292	37	192	229	269	22	291	257	193	450	205	89	294	164	74	238	284	28	312
August . .	88	408	496	118	213	331	237	58	295	267	195	462	209	47	256	180	88	268	365	52	417
September .	126	301	427	200	293	493	331	46	377	273	176	449	304	62	366	302	186	488	386	58	444
October .	269	326	595	447	251	698	407	219	626	341	93	434	459	115	574	439	154	593	527	90	617
November .	337	175	512	414	214	628	438	262	700	424	82	506	665	122	787	680	126	806	683	93	776
December .	395	167	562	367	99	466	415	222	367	479	131	610	628	127	755	629	149	778	692	69	761
January .	327	120	447	476	127	603	381	140	521	386	126	512	471	108	579	532	197	729	682	556	738
February .	195	106	301	236	157	394	330	81	411	329	115	444	427	164	591	533	149	82	525	40	565
March . .	176	53	229	207	131	338	380	104	484	276	83	359	376	125	501	485	160	645	441	40	481
April . .	287	149	436	223	57	280	264	38	302	240	78	318	310	78	388	384	94	478	341	35	376
May . .	180	281	461	320	42	362	353	21	374	244	109	353	209	102	311	306	47	353	386	35	421
June . .	73	243	316	167	53	219	341	112	453	213	101	314	165	107	272	254	46	300	308	47	355
TOTAL .	2,497	2,577	5,074	3,212	1,829	5,040	4,146	1,325	5,471	5,729	1,482	5,211	4,428	1,246	5,674	4,888	1,470	6,358	5,620	643	6,263

Source.—Monthly Summary of Jute and Gunny Statistics published by the Indian Jute Mills Association, Calcutta.

APPENDIX B-VI

Purchases of Raw Jute by Mills in India

(Thousand bales of 400 lbs. each)

Year (July-June)	I.J.M.A. Mills	Non I.J.M.A. Mills	Total
(1)	(2)	(3)	(4)
1929-30	6,132	245	6,377
1930-31	6,404	256	6,660
1931-32	3,090	124	3,214
1932-33	4,864	422	5,286
1933-34	4,103	431	4,534
1934-35	5,082	566	5,648
1935-36	4,025	458	4,483
1936-37	5,551	530	6,081
1937-38	5,906	505	6,411
1938-39	5,536	346	5,882
1939-40	7,105	400	7,505
1940-41	7,867	620	8,487
1941-42	4,694	285	4,979
1942-43	7,263	358	7,621
1943-44	5,586	435	6,021
1944-45	5,708	298	6,006
1945-46	6,861	274	7,135
1946-47	4,767	434	5,201
1947-48	5,853	390	6,243
1948-49	5,473	390	5,863
1949-50	4,722	432	5,154
1950-51	5,498	489	5,987
1951-52	5,540	483	6,023
1952-53	5,764	481	6,245
1953-54	4,855	430	5,285
1954-55	5,569	477	6,046
1955-56	6,244	556	6,800
1956-57	6,359	N.A.	6,359

N.A.--Not Available

Source. —(i) Annual Report of IJMA. (ii) The Indian Central Jute Committee.

APPENDIX B-VII

Monthly Purchases of Raw Jute by I. J.M.A. Mills at Calcutta

(Thousand bales of 400 lbs. each)

Month	1951-52			1952-53			1953-54			1954-55			1955-56			1956-57		
	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total	From India	From Pakistan	Total
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)
July	378	668	1,046	228	35	263	306	127	433	292	65	357	284	190	474	341	43	384
August . . .	241	203	444	422	134	556	222	60	282	361	117	478	265	159	424	493	83	576
September . . .	393	125	518	495	306	801	232	53	285	374	80	454	406	110	516	503	48	551
October . . .	372	122	494	384	276	660	445	45	490	472	102	574	558	123	681	509	38	547
November . . .	519	122	641	248	119	367	465	94	559	694	110	794	579	229	808	661	63	724
December . . .	512	218	730	401	40	441	430	112	542	411	36	447	391	113	504	713	20	733
January . . .	275	150	425	206	31	237	331	45	376	542	86	628	597	163	760	464	14	478
February . . .	291	101	392	360	25	385	222	49	271	321	9	411	346	9	355	423	30	453
March . . .	334	33	367	315	31	346	267	51	318	255	73	328	405	18	423	294	23	317
April . . .	336	104	440	402	90	492	290	149	439	219	100	319	376	27	403	386	32	418
May	340	5	345	481	155	636	254	80	334	179	96	274	385	21	406	416	47	463
June	345	19	364	308	177	485	323	9	413	309	126	435	378	87	415	303	56	359
TOTAL . .	4,336	1,870	6,206	4,250	1,419	5,669	3,787 (3,785)	935 (937)	4,722	4,419 (4,444)	1,080 (1,058)	5,499 (5,502)	4,970	1,199	6,169	5,506	497	6,003

NOTE.—Figures in brackets represent the revised Annual figures only, for which monthly break-up figures are not available.

Source.—Monthly Summary of Jute and Gunny Statistics Published by the Indian Jute Mills Association.

APPENDIX No. B-VIII

Consumption of Raw Jute by Mills in India

(Lakh bales of 400 lbs. each)

Year (July-June)	I. J. M. A. Mills (a)	Non I.J. M. A. Mills	Total
(1)	(2)	(3)	(4)
1929-30	64·24	2·57	66·81
1930-31	45·64	1·83	47·47
1931-32	42·69	1·71	44·40
1932-33	43·67	1·75	45·42
1933-34	43·17	1·73	44·90
1934-35	45·82	1·83	47·65
1935-36	50·12	2·00	52·12
1936-37	60·62	2·42	63·04
1937-38	66·88	2·68	69·56
1938-39	62·26	2·49	64·75
1939-40	72·15	2·89	75·04
1940-41	55·38	2·22	57·60
1941-42	70·36	2·81	73·17
1942-43	69·23	2·77	72·00
1943-44	55·54	2·22	57·76
1944-45	57·78	2·31	60·09
1945-46	62·40	2·78	65·18
1946-47	57·84	2·97	60·81
1947-48	61·51	3·50	65·01
1948-49	61·75	3·88	65·63
1949-50	49·10	4·16	53·26
1950-51	52·01	4·54	56·55
1951-52	55·81	4·99	60·80
1952-53	52·01	4·46	56·47
1953-54	50·55	4·33	54·88
1954-55	57·51	5·12	62·63
1955-56	62·92	5·25	68·17
1956-57	60·00	2·20	62·20

(a) Excluding figures of Gagalbhai, Kedarnath, Bharat and Nafar Chandra Jute Mills from 1951-52 onwards.

Source. (i) Indian Central Jute Committee. (ii) Annual Reports of I. J. M. A.

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APPENDIX B-IX

Indian Domestic Consumption of Jute

As estimated by the Indian Jute Mills Association.

(Thousand bales of 400 lbs. each)

Year (July-June)	
(1)	(2)
1947-48	300
1948-49	300
1949-50	150
1950-51	150
1951-52	100
1952-53	100
1953-54	100
1954-55	210
1955-56	230
1956-57	200

Source. Monthly Summary of Jute and Gunny Statistics of I.J.M.A.

APPENDIX B-X

Stocks of Raw Jute with Mills in India

(Lakh bales of 400 lbs. each)

End of Period	I.J.M.A. Mills (a)	Non. I.J.M.A. Mills	All India
(1)	(2)	(3)	(4)
1930-31	53·20	2·30	55·50
1931-32	41·40	2·10	43·50
1932-33	46·40	1·60	48·00
1933-34	44·30	3·20	47·50
1934-35	49·30	2·58	51·88
1935-36	39·40	2·47	41·87
1936-37	33·40	1·72	35·12
1937-38	26·50	1·45	27·95
1938-39	20·63	0·73	21·36
1939-40	18·18	1·72	19·90
1940-41	45·83	0·70	46·53
1941-42	21·38	2·20	23·58
1942-43	26·52	0·74	27·26
1943-44	23·42	2·41	25·83
1944-45	27·12	2·13	29·25
1945-46	26·05	1·26	27·31
1946-47	19·81	1·29	21·10
1947-48	16·08	0·92	17·00
1948-49	12·57	0·57	13·14
1949-50	7·19	1·19	8·38
1950-51	8·99	1·14	10·13
1951-52	9·58	1·17	10·75
1952-53	13·59	1·26	14·85
1953-54	12·06	10·02	13·08
1954-55	9·48	0·94	10·42
1955-56	9·60	1·31	10·91
1956-57	11·19	N.A.	11·19

N. A.—Not Available.

(a) Figures for Gagalbhai, Nafar Chandra, Kedarnath and Bharat Jute Mills are not included from 1947-48 on-wards.

Source : (i) Indian Central Jute Committee. (ii) Annual Reports of I.J.M.A. (iii) Todd's Report. (iv) Monthly Summary of Jute and Gunny Statistics I.J.M.A.

APPENDIX B-XI

Production of Jute Goods in India

Year (July-June)	Hessian		Sacking		Others		Total
	Absolute ('000 tons)	Percentage to total	Absolute ('000 tons)	Percentage to total	Absolute ('000 tons)	Percentage to total	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1937-38 . .	569	43	712	53	59	4	1,340
1938-39 . .	475	41	635	54	57	5	1,167
1939-40 . .	588	44	682	51	64	5	1,334
1940-41 . .	464	44	536	50	62	6	1,062
1941-42 . .	563	46	588	48	79	6	1,230
1942-43 . .	401	33	661	55	142	12	1,204
1943-44 . .	386	41	521	54	47	5	954
1944-45 . .	415	41	545	55	39	4	999
1945-46 . .	463	42	581	54	41	4	1,085
1946-47 . .	419	44	510	52	34	4	963
1947-48 . .	482	46	520	50	33	4	1,035
1948-49 . .	434	42	577	55	29	3	1,040
1949-50 . .	285	35	505	61	35	4	825
1950-51 . .	330	38	493	58	35	4	858
1951-52 . .	310	33	607	64	29	3	946
1952-53 . .	348	39	511	57	33	4	892
1953-54 . .	390	45	445	51	31	4	866
1954-55 . .	399	40	558	56	38	4	995
1955-56 . .	403	37	623	57	69	6	1,095
1956-57 . .	428	42	527	70	51	7	1,025

NOTE.—Figures from 1948-49 onwards relate to I.J.M.A. Mills.

Source: (i) Indian Central Jute Committee. (ii) Jute & Gunny Statistics Published by I.J.M.A.

APPENDIX B-XII

Consumption of Jute manufactures in India

(Thousand tons)

Year (July-June)	Hessian	Sacking	Others	Total
(1)	(2)	(3)	(4)	(5)
1937-38	—	—	—	88
1938-39	—	—	—	121
1939-40	—	—	—	130
1940-41	—	—	—	152
1941-42	—	—	—	235
1942-43	—	—	—	355
1943-44	—	—	—	182
1944-45	47	198	27	272
1945-46	32	193	21	246
1946-47	16	118	16	150
1947-48	14	96	14	124
1948-49	15	112	15	142
1949-50	12	90	15	117
1950-51	12	886	16	114
1951-52	18	116	13	147
1952-53	19	131	18	168
1953-54	18	85	14	117
1954-55	20	99	19	138
1955-56	26	141	23	190
1956-57	22	135	22	179

NOTE.—Figures relate to quantities cleared for home consumption by I.J.M.A. Mills. Comparative figures for Non-I.J.M.A. mills are not available.

Source.—Monthly and Annual Reports of Indian Jute Mills Association.

APPENDIX B-XIII

Stocks of Jute Manufactures with I. J. M. A. Mills

(Thousand tons)

End of period (July-June)	Hessian	Sacking	Others	Total
(1)	(2)	(3)	(4)	(5)
1941-42	147	105	—	252
1942-43	154	122	—	276
1943-44	81	115	—	196
1944-45	78	98	—	176
1945-46	83	102	3	188
1946-47	61	111	4	176
1947-48	53	63	4	120
1948-49	55	50	2	107
1949-50	21	47	3	71
1950-51	26	61	3	90
1951-52	41	56	2	99
1952-53	46	86	2	134
1953-54	36	49	2	87
1954-55	49	36	3	88
1955-56	38	83	6	127
1956-57	42	65	9	116

N.B.—Information about Non-I.J.M.A. Mills is not available.

Source. (i) Indian Jute Mills Association. (ii) Indian Central Jute Committee.

APPENDIX B-XIV

Exports of Jute Goods from India

Year April to March	Hessian		Sacking		Others		Total
	Absolute ('000 tons)	Percentage to total	Absolute ('000 tons)	Percentage to total	Absolute ('000 tons)	Percentage to total	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1933-34 . . .	304·3	45·27	357·3	53·15	10·6	1·58	672·2
1934-35 . . .	309·8	45·31	366·6	53·61	7·4	1·08	683·8
1935-36 . . .	354·1	47·08	389·7	51·82	8·2	1·10	752·0
1936-37 . . .	487·7	50·18	470·3	48·40	13·8	1·42	971·8
1937-38 . . .	477·9	45·08	562·7	53·08	19·5	1·84	1060·1
1938-39 . . .	450·7	47·13	488·4	51·07	17·2	1·80	956·3
1939-40 . . .	546·0	50·41	510·8	47·16	26·3	2·43	1083·1
1940-41 . . .	464·0	50·20	445·5	48·19	14·9	1·61	924·4
1941-42 . . .	460·2	51·20	403.0	44·84	35·5	3·96	898·7
1942-43 . . .	272·8	44·02	331·2	53·46	15·6	2·52	619·6
1943-44 . . .	342·2	53·94	281·9	44·44	10·3	1·62	634·4
1944-45 . . .	382·0	53·94	311·0	43·91	15·2	2·15	708·2
1945-46 . . .	403·9	59·37	245·1	36·03	31·2	4·60	680·2
1946-47 . . .	360·4	49·30	337·0	46·10	33·5	4·60	730·9
1947-48 . . .	441·5	50·62	398·6	45·71	32·0	3·67	872.1
1948-49 . . .	450·8	48·54	442·4	47·63	35·6	3·83	928·8
1949-50 . . .	314·3	40·00	427·8	54·40	43·6	5·60	785·7
1950-51 . . .	272·2	41·89	334·3	51·45	43·3	6·66	649·8
1951-52 . . .	301·8	37·40	457·5	56·70	47·5	5·90	806·8
1952-53 . . .	310·7	44·01	362·4	51·34	32·8	4·65	705·9
1953-54 . . .	391·2	50·30	350·8	45·10	35·8	4·60	777·8
1954-55 . . .	369·6	43·44	440·7	51·79	40·6	4·77	850·9
1955-56 . . .	382·1	44·22	432·8	50·09	49·1	5·69	864·0
1956-57 . . .	402·3	46·90 47·17	412·1	46·73 48·32	38·5	6·37 4·51	852·9

Source.—Accounts relating to Foreign Trade (*See*, Air and Land) and Navigation of India.

APPENDIX B-XV

Country-wise Exports of Jute Goods

Unit—Thousand tons
Year—April to March

Countries	1951-52	1952-53	1953-54	1954-55	1955-56
(1)	(2)	(3)	(4)	(5)	(6)
Hessian					
U.K.	69·9	18·7	62·5	63·0	38·2
Rest of Europe	0·7	1·0	1·7	1·5	3·7
Near East	5·7	2·4	2·4	1·0	3·2
Far East	2·7	6·8	4·6	4·2	7·6
Africa	8·8	6·1	0·7	4·7	8·3
U.S.A.	131·3	177·8	142·8	154·5	172·4
Canada	17·1	22·0	24·6	27·8	31·9
Argentina	44·5	31·5	102·3	69·1	61·4
Rest of America	7·6	9·1	7·7	9·7	9·1
Australia	9·7	5·4	11·2	11·2	14·1
New Zealand	2·5	1·4	1·7	3·1	3·5
Others	1·3	28·5	29·0	19·8	28·7
TOTAL—HESSIAN	301·8	310·7	391·2	369·6	382·1
Sacking					
U.K.	23·8	17·3	15·8	15·5	15·1
Rest of Europe	19·3	7·0	11·1	9·8	10·2
Near East	28·5	28·8	15·7	22·4	10·4
Far East	100·9	63·7	70·6	84·1	87·4
Africa	81·7	53·9	43·2	76·6	74·2
U.S.A.	2·7	1·6	1·7	1·7	1·6
Canada	0·8	..	..	..	..
Argentina	1·3	1·7	1·5	3·1	1·5
Rest of America	105·6	84·1	73·7	68·6	66·2
Australia	79·6	47·8	57·2	93·5	107·1
New Zealand	10·0	7·1	6·3	12·8	10·2
Others	3·6	49·4	54·0	52·6	48·9
TOTAL—SACKING	457·8	362·4	350·8	440·7	432·8
Total including other Jute Manufactures	806·8	705·9	777·8	850·9	864·0
Value (Crore Rs.)	270·16	128·92	113·80	123·78	118·25

Source.—Accounts relating to Foreign Trade (Sea, Air and Land) and Navigation of India.

APPENDIX B-XVI

Export Duties on Jute Manufactures in Recent Years

(Rs. per ton).

	Hessian	Sacking
Pre-war (late thirties)	32	20
From 26th October, 1946	80	50
From 29th September, 1949	350	50
From 21st October, 1950	750	50
From 20th November, 1950	1,500	150
From 30th March, 1951	1,500	350
From 18th February, 1952	750	350
From 16th May, 1952	275	175
From 1st March, 1953	275	80
From 15th September, 1953	120	80
From 2nd August, 1955	Abolished	Abolished

APPENDIX B-XVII

Ratio of Wholesale Price of Raw Jute to Wholesale Price of Rice and Paddy in Different States

1. WEST BENGAL

(Rs. per maund)

Year	Raw Jute (Bottom) Belakoba	Rice				Raw Jute//Rice and Paddy Ratio			
		Santhri (Coarse)	Balurghat (Medium)	Matiahat (Coarse)	Contai (Coarse)	Col (2) Col. (3)	(Col. (2) Col. (4)	Col. (2) Col. (5)	Col. (2) Col. (6)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
1952 .	48	16—14	16—14	16—6	16—0	2·84 (4·26)	2·84 (4·26)	2·93 (4·40)	3·00 (4·50)
1953 .	23	16—8	16—7	15—10	16—0	1·39 (2·09)	1·40 (2·10)	1·47 (2·21)	1·44 (2·16)
1954 .	25	14—15	14—13	13—14	13—2	1·70 (2·55)	1·69 (2·54)	1·80 (2·70)	1·90 (2.85)
1955 .	31	15—8	12—15	..	14—14	2·00 (3·00)	2·40 (3·60)	..	2·08 (3·12)
1956 .	23	16—14	18—2	16—1	15—4	1·36 (2·04)	1·27 (1·91)	1·43 (2·15)	1·51 (2·27)

2. BIHAR

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Year	Raw Jute (Bottom) Purnea	Rice			Raw Jute/ Rice and Paddy Ratio		
		Jayanagar (Coarse)	Gaya (Coarse)	Dumka (Coarse)	Col. (2) Col. (3)	Col. (2) Col. (4)	Col. (2) Col. (5)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1952	34	26—10	24—8	20—0	1·28 (1·92)	1·47 (2·20)	1·70 (2·55)
1953	15	18—14	19—0	18—4	0·79 (1·18)	0·79 (1·19)	0·82 (1·23)
1954	25	16—7	15—7	13—9	1·52 (2·28)	1·62 (2·43)	1·84 (2·76)
1955	31	14—12	13—8	13—9	2·10 (3·15)	2·30 (3·45)	2·29 (3·44)
1956	24	16—0	14—8	16—8	1·50 (2·25)	1·66 (2·49)	1·45 (2·18)

3. ASSAM

Year	Raw Jute (Bottom) Nowgong	Rice			Raw Jute/ Rice & Paddy Ratio		
		Hail-kandi (Sali)	Badati (Sali)	Thiu (Sali)	Col.(2) / Col. (3)	Col. (2) / Col. (4)	Col. (2) / Col. (5)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1952 . . .	39	19—11	20—0	24—11	2·04 (3·06)	1·95 (2·93)	1·58 (2·37)
1953 . . .	17	20—6	18—3	17—12	0·83 (1·25)	0·93 (1·89)	0·96 (1·44)
1954 . . .	23	21—10	17—5	16—0	1·06 (1·59)	1·33 (2·00)	1·44 (2·16)
1955 . . .	30	14—4	14—12	16—0	2·11 (3.17)	2·03 (3·05)	1·88 (2·82)
1956 . . .	26	17—4	17—12	17—8	1·51 (2·27)	1·46 (2·19)	1·49 (2·24)

4. ORISSA

Year	Raw Jute (Bottom) Kendra para	Rice			Raw Jute/Rice & Paddy Ratio		
		Bala-sore (Common)	Sambal-pur (Common)	Jey-pore (Common)	Col. (2) / Col. (3)	Col. (2) / Col. (4)	Col. (2) / Col. (5)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1952 . . .	42	13—3	13—0	12—3	3·18 (4·77)	3·23 (4·84)	3·45 (5·18)
1953 . . .	16	13—6	13—0	10—13	1·20 (1·80)	1·23 (1·85)	1·48 (2·22)
1954 . . .	28	12—15	13—6	12—12	2·16 (3·24)	2·09 (3·14)	2·20 (3·30)
1955 . . .	36	12—1	12—0	9—9	2·98 (4·47)	3·00 (4·50)	3·76 (5·64)
1956 . . .	25	. .	14—12	13—4	. .	1·69 (2·54)	1·89 (2·84)

NOTE.—Figures in brackets represent Jute/Paddy Ratio.

APPENDIX B-XVII—*concld.*

Distribution of Raw Jute/Rice prices ratios

Interval	1952	1953	1954	1955	1956	Total 1952—56	Percentage Distribution of Col. 7			
							Col. (7)	Progressive value	Excluding value*	Progressive Total
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
0-1	..	6	..	..	..	6	10	10	..	..
1·0—2·0	..	..	1	..	..	1	2	12	2	2
1·2—1·4	1	3	1	..	2	7	11	23	14	16
1·4—1·6	2	4	2	..	7	15	24	47	29	45
1·6—1·8	1	..	3	..	2	6	10	57	12	57
1·8—2·0	1	..	3	1	1	6	10	67	12	69
2·0—2·2	1	..	2	5	..	8	13	80	16	85
2·2—2·4	..	..	1	2	..	3	5	85	6	91
2·4—2·6	..	..	..	..	..	1	2	87	2	93
2·6—2·8	..	..	..	..	..	..	..	..	..	..
2·8—3·0	3	..	..	..	..	4	6	93	8	101
3·0 & above	4	..	..	2	..	6	10	103	..	101
TOTAL	13	13	13	10	12	63	103	..	101	..

*end values under 1·0 and above 3·0.

Estimation of Average Value of the Ratios (excluding the Extreme Values viz. under 1 and over 3)

Mid-pt. of interval (Y)	frequency	(1) ×(2)
(1)	(2)	(3)
1·1	1	1·1
1·3	7	9·1
1·5	15	22·5
1·7	6	10·2
1·9	6	11·4
2·1	8	16·8
2·3	3	6·9
2·5	1	2·5
2·9	4	11·6
TOTAL	51	92·1

$$Y = \frac{92 \cdot 1}{51} = 1 \cdot 81$$

APPENDIX B-XVIII

Jute and Paddy Cost Ratio and Price Ratio

Centres	1954-55 Jute and Paddy (i) Cost Ratio	1954-55 Jute and Paddy (ii) Price Ratio	1955-56 Jute and Paddy (i) Cost Ratio	1955-56 Jute and Paddy (ii) Price Ratio
1	2	3	4	5
Monoharpur . . .	1·84	2·57	2·62	2·37
Belakoba	2·19	3·01	1·99	2·79
Purnea	1·90	2·59	1·45	2·52
Kendrapara	2·42	4·91	2·59	3·84
Nowgong	1·68	2·28	1·85	2·44
All Centres weighted Average .	2·09	2·80	2·08	2·63

Source.—Indian Central Jute Committee (Economic Research Section *Ad hoc* Surveys).

APPENDIX B-XIX

Average Cost of Production of Jute

(Rs. per maund).

Year (July to June)	Monoharpur	Belakoba	Purnea	Kendrapara	Nowgong	All centres weighted Average
1	2	3	4	5	6	7
1948-49 .	26-4	37-10	15-7	19-5	34-9	29-5
1949-50 .	28-15	27-7	24-4	19-6	28-5	27-6
1950-51 . .	49-7	28-14	26-0	23-5	25-0	28-13
1951-52 . .	28-3	26-13	26-13	24-8	33-9	28-14
1952-53 . .	34-5	19-3	17-3	17-4	22-3	22-6
1953-54 . .	28-3	14-14	17-1	21-1	17-5	18-1
1954-55 . .	28-2	20-13	14-0	16-10	18-1	19-14
1955-56 . .	30-4	16-14	15-2	16-15	21-8	19-14

Source.—Indian Central Jute Committee (Economic Research Section)—*ad hoc surveys*).

APPENDIX B-XX

Fair Price of Raw Jute on the Basis of the Jute Enquiry Commission's Suggestions

	1952-53		1953-54		1954-55		1955-56		1956-57	
(1)	(2)		(3)		(4)		(5)		(6)	
	Rs.	as.	Rs.	as.	Rs.	as.	Rs.	as.	Rs.	as.
Average Price of Hessian 40 × 10 oz. (Rs. per 100 yds.)	44	8	45	1	44	13	39	9	42	7
Average price of sacking B. Twill (Rs. per 100 bags) .	100	11	104	10	117	9	109	9	112	10
Reasonable price of Raw jute (Rs. per md.) . .	23	11	25	6	25	1	23	0	24	8
Actual Market Price of Raw Jute (Indian Jat Bottom (Calcutta) (Rs. per md.)	24	0	26	9	29	11	27	4	30	7

N.B.—According to the Jute Enquiry Commission's Report when the prices of Hessian (40″ × 10 oz.) range from Rs. 44 to 46 per 100 yards while that of sacking (B. T wills) range from Rs. 108 to 114 per 100 bags the price of raw jute Assam Bottoms is likely to rule between Rs. 24 to 26 per maund.

APPENDIX B-XXI

Calcutta Landed Cost of Jute for 1955-56

(Rs. per maund)

Secondary Markets	Transport and other costs from village to Market			Cost of Transport to Calcutta including Calcutta Expenses			Total Transport Cost at Calcutta‡		
1	2			3			4		
	Rs.	as.	p.	Rs.	as.	p.	Rs.	as.	p.
Sheoraphuli	0	4	0	0	13	0	1	1	0
Belakoba	0	3	10	2	12	8	3	0	6
Purnea*	0	2	4	2	4	2	2	6	6
Danpur	0	5	10	2	0	5	2	6	3
Nowgong†	0	5	0	4	2	1	4	7	1

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* For Gulagbbah

† For Haibergaon

‡ Excluding Baler's Expenses at the market.

Source.—Indian Central Jute Committee (Report on the study of Mofussil prices and other Statistics of Jute 1955-56).

APPENDIX B-XXII

Month-end Wholesale Prices of Assam Jat Variety of Raw Jute at Calcutta

(Rs. per maund)

Month-End	1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
July	38 0	35 0	74 0	71 0	26 0	22 0	30 0	26 0	24 0	21 8	32 0	29 0	30 0	28 8
August	38 0	35 0	53 0	49 0	31 0	27 0	30 8	27 8	31 0	27 0	29 8	25 8	31 8	29 8
September	38 0	35 0	N.A.	56 0	33 0	29 0	26 0	23 8	30 0	27 8	26 8	23 8	31 0	29 0
October	38 0	35 0	N.A.	55 0	30 0	26 8	28 0	26 8	30 0	26 8	N.A.	24 12	31 8	35 0
November	38 0	35 0	56 0	54 0	N.A.	23 8	31 8	28 8	34 0	31 0	30 8	27 8	34 8	32 8
December	38 0	35 0	60 0	57 0	28 0	24 8	32 0	29 0	33 0	29 8	30 8	27 8	35 0	32 8
January	38 0	35 0	60 0	57 0	25 0	21 8	31 0	28 0	37 8	35 0	31 8	29 0	34 0	32 8
February	38 0	35 0	47 0	45 0	25 0	21 8	30 0	25 8	40 8	38 0	33 0	30 0	34 0	27 8
March	75 0	72 0	35 0	37 0	22 0	19 0	28 0	25 0	35 8	32 8	30 8	27 8	37 0	28 8
April	98 0	95 0	36 0	34 0	22 0	19 0	N.A.	29 0	36 0	32 0	30 0	27 0	39 0	29 0
May	106 0	103 0	30 0	27 0	31 0	28 0	29 0	25 8	31 0	28 0	29 8	26 8	34 0	31 0
June	105 0	102 0	29 0	27 0	30 0	26 8	25 0	22 0	31 8	28 8	30 8	27 8	34 0	32 8
Average	57 0	54 0	48 0	47 0	28 0	24 0	29 0	27 8	33 0	30 6	31 8	27 8	33 12	30 11

N.A. Not Available.

Source. Directorate of Economics and Statistics.

APPENDIX B-XXIII

Month-end Wholesale Prices of Raw Jute at some Mofussil Centres

BELAKOBA (WEST BENGAL)

(Rs. per maund)

Month-end	1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
July . . .	N.A.	N.A.	60 8	57 10	21 15	19 1	N.A.	N.A.	18 1	15 4	24 5	21 5	24 12	21 12
August . .	N.A.	N.A.	41 15	39 0	26 11	23 13	N.A.	N.A.	27 10	24 0	24 9	21 9	26 15	28 15
September . .	36 4	33 6	52 14	50 0	29 1	26 3	N.A.	N.A.	26 11	23 13	22 10	19 10	27 2	24 14
October . .	37 10	34 12	52 14	50 0	27 9	25 12	N.A.	N.A	25 4	22 6	24 5	21 5	28 1	25 11
November . .	37 0	34 3	53 5	50 8	25 4	22 6	29 1	26 3	27 10	24 12	26 8	23 8	29 12	27 6
December . .	37 8	N.A.	56 11	53 13	27 6	24 8	30 0	27 2	29 9	25 9	25 11	22 11	30 0	27 10
January . .	40 0	37 2	66 3	63 5	25 14	23 1	28 1	25 1	35 2	32 2	28 2	25 2	30 0	27 0
February . .	43 13	40 15	N.A.	N.A.	25 14	23 1	28 9	25 9	37 5	34 5	28 5	25 4	N.A.	N.A.
March . .	N.T.	N.T.	N.A.	N.A.	N.A.	N.A.	25 11	22 14	31 7	28 9	25 4	22 4	27 10	25 4
April . . .	83 13	80 15	35 11	32 14	N.A.	N.A.	27 0	24 0	31 7	28 9	23 13	20 13	26 3	23 3
May . . .	N.T.	N.T.	N.A.	N.A.	N.A.	N.A.	26 0	23 0	N.A.	N.A.	22 14	19 14	27 2	24 12
June . . .	N.T.	N.T.	N.A.	N.A.	N.A.	N.A.	24 0	21 0	27 10	24 10	23 1	20 1	N.A.	N.A.
Average . .	45 2	43 9	52 8	49 10	26 3	23 8	27 4	24 5	28 14	25 13	24 15	21 15	27 12	25 11

N.T.—No Transaction.
N.A.—Not available.
Source.—Directorate of Economics and Statistics.

APPENDIX B-XXIV

Month-end Wholesale Prices of Raw Jute at Some Mofussil Centres

NOWGONG (ASSAM)

(Rs. per maund)

Month-end	1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
July . . .	33 15	32 0	70 4	67 7	20 15	18 2	N.A.	21 3	20 5	18 2	28 14	26 1	25 1	23 3
August . .	34 6	32 9	40 0	37 3	22 10	21 13	N.A	24 0	24 12	21 14	23 12	20 15	24 2	22 12
September . .	31 15	30 1	53 12	50 15	26 15	24 2	N.A.	18 6	23 12	20 15	21 14	19 1	25 1	23 3
October .	31 5	29 7	59 12	53 4	23 4	20 7	N.A	20 12	24 2	21 5	20 0	17 11	24 10	22 13
November . .	30 5	29 0	50 4	47 7	16 12	13 12	25 9	22 9	25 9	22 12	24 10	22 5	28 7	N.A.
December . .	36 12	34 14	55 5	52 9	22 5	19 8	27 0	24 3	26 1	23 4	24 10	22 6	27 7	25 8
January . .	41 14	40 0	54 7	51 10	17 8	14 11	26 1	23 4	33 8	30 11	26 7	24 2	27 14	26 0
February . .	68 0	66 8	43 4	40 0	19 9	16 13	26 12	23 4	24 6	31 10	26 8	23 8	25 1	23 5
March . .	80 0	76 2	35 5	32 9	17 11	14 14	23 12	20 15	31 10	28 13	25 5	22 5	25 2	23 4
April . . .	N.T.	N.T.	34 6	31 6	N.Q.	N.Q.	27 0	21 0	29 12	26 15	N.T	N.T.	25 2	23 4
May . . .	N.T.	N.T.	N.A.	N.A.	N.Q.	22 9	25 0	22 0	27 7	24 10	23 0	21 13	28 0	25 8
June . . .	N.T.	N.T.	23 12	20 15	N.Q	22 9	22 0	19 0	25 2	22 5	24 2	22 5	27 8	25 8
Average . .	43 3	41 2	47 5	44 2	20 13	19 6	25 14	21 15	27 3	24 6	24 9	22 8	26 2	24 0

N.A.—Not Available.
N.Q.—Not Quoted.
N.T.—No Transaction.
Sources.—Directorate of Economics and Statistics.

APPENDIX XXV

Month-end Wholesale Prices of Raw Jute at some Mofussil Centres

PURNEA (BIHAR)

(Rs. per maund)

Month end	1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
July	37 0	36 0	72 0	68 0	20 0	17 0	N.A.	19 5	20 4	17 12	30 4	27 4	27 8	25 8
August	39 0	37 0	68 0	63 0	29 0	26 0	N.A.	24 0	26 2	23 2	27 10	24 10	27 8	25 8
September	37 4	35 7	49 0	47 0	29 0	26 0	N.A.	19 5	27 8	24 12	23 0	20 0	27 0	25 0
October	36 6	35 6	50 0	48 0	22 0	19 0	N.A.	20 5	26 0	23 0	23 2	20 6	26 0	25 0
November	36 8	35 8	50 0	48 0	16 12	13 9	26 0	23 0	28 6	25 6	26 8	23 8	28 4	26 4
December	37 0	35 0	50 0	48 0	21 13	19 0	28 8	25 6	28 9	25 12	26 0	23 0	28 0	26 0
January	48 0	46 0	52 0	50 0	19 9	17 3	28 0	25 0	34 3	31 3	26 10	23 10	29 0	27 0
February	74 0	70 0	35 0	30 0	19 10	17 6	26 9	23 9	37 10	34 10	27 14	24 14	26 0	24 0
March	N.T.	N.T.	30 0	27 0	15 3	12 10	25 3	23 8	32 2	29 2	26 1	23 1	26 8	24 8
April	N.T.	N.T.	33 0	29 0	N.Q.	13 14	28 0	25 0	31 0	28 0	26 8	23 8	26 0	24 0
May	N.T.	N.T.	21 0	17 0	N.Q.	21 14	27 0	24 0	29 8	26 8	25 11	24 0	29 8	27 0
June	N.T.	N.T.	24 10	21 0	N.Q.	20 9	23 0	20 0	25 0	23 0	25 0	23 0	26 0	23 8
Average	43 4	41 5	44 9	41 5	21 7	18 11	26 7	22 10	28 14	26 0	26 3	24 5	27 6	25 7

N.Q.—Not Quoted.
N.T.—No Transaction.
Source.—Directorate of Economics and Statistics.

APPENDIX B-XXVI

Month-end Wholesale Prices of Raw Jute at some Mofussil Centres

(KENDRAPARA ORISSA)

(Rs. per maund)

Month-end	1950-51		1951-52		1952-53		1953-54		1954-55		1955-56		1956-57	
	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom	Middle	Bottom
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
July . . .	N.A.	N.A.	N.A.	N.A.	25 8	22 8	N.A.	21 8	21 8	18 1	23 0	20 0	N.T.	N.T.
August . .	N.A.	N.A.	N.A.	N.A.	27 0	24 0	N.A.	N.A.	N.A.	N.A.	25 1	21 1	N.T.	24 0
September . .	N.A.	N.A.	N.A.	N.A.	27 0	24 0	N.A.	N.A.	N.A.	N.A.	24 8	21 8	27 0	24 8
October . .	N.A.	N.A.	N.A.	N.A.	27 0	24 0	N.A.	N.A.	27 4	24 4	26 0	23 0	27 4	24 12
November . .	N.A.	N.A.	49 0	46 0	22 8	19 8	26 12	23 12	30 8	27 8	28 0	25 0	32 14	30 6
December . .	N.A.	N.A.	51 0	48 0	22 12	19 12	28 12	25 12	N.A.	N.A.	27 0	24 0	35 12	33 4
January . .	N.A.	N.A.	57 0	54 0	18 12	15 12	29 4	26 4	N.A.	N.A.	28 2	25 10	35 14	33 6
February . .	N.A.	42 0	47 0	44 0	19 12	16 12	27 8	24 8	39 0	36 0	28 0	25 8	28 12	26 4
March . .	N.A.	66 0	N.A.	N.A.	17 8	14 8	25 8	22 8	N.A.	N.A.	25 8	23 0	29 1	26 9
April . . .	N.A.	81 0	31 0	28 0	N.Q.	N.Q.	30 0	27 0	N.A.	N.A.	23 8	23 0	29 8	27 0
May . . .	N.A.	N.T.	26 0	23 0	N.Q.	21 12	27 0	24 0	N.A.	N.A.	N.A.	21 4	N.A.	N.A.
June . . .	N.A.	N.T.	28 0	23 0	N.Q.	23 4	26 0	22 0	N.A.	N.A.	N.A.	21 6	N.A.	N.A.
Average . .	N.A.	63 0	41 5	37 15	23 1	20 9	27 13	24 4	29 9	26 10	25 14	22 12	30 12	27 12

N.Q.—Not Quoted.
N.A.—Not Available.
N.T.—No Transaction.
Source.—Directorate of Economics and Statistics.

APPENDIX B-XXVII

Average Wholesale Prices of Mesta (Garsat) at Calcutta

(Rs. per maund)

Month-end	1952-53	1953-54	1954-55	1955-56	1956-57
1	2	3	4	5	6
July	N.A.	18 5	16 13	26 4	27 8
August	N.A.	18 12	18 4	26 8	27 8
September	N.A.	16 8	20 8	23 8	28 0
October	18 8	17 3	20 3	25 0	N.R.
November	16 4	22 4	24 8	25 10	N.R.
December	15 10	24 6	25 4	26 8	29 0
January	15 6	24 6	27 10	27 0	28 0
February	15 4	22 6	33 0	26 8	24 0
March	12 12	18 6	29 14	25 8	24 8
April	12 11	21 12	28 13	25 0	25 0
May	18 0	19 10	27 10	25 0	27 0
June	19 8	18 4	24 11	26 0	29 0
Average	16 0	20 3	24 12	25 11	27 1

N.A.—Not Available.

N.R.—Not Reported.

Source.—Directorate of Economics and Statistics.

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APPENDIX B-XXVIII

Month-end Wholesale Prices of Hessian (40″×10 oz.) at Calcutta.

(Rs per 100 yards)

Month-End	Average 1936-37 to 1938-39†	1947-48*	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56	1956-57
1	2	3	4	5	6	7	8	9	10
July . . .	9 0	43 12	55 0	88 12	41 6	46 2	43 0	42 8	38 3
August . . .	9 3	48 9	55 0	67 8	47 2	43 13	47 14	40 9	41 11
September . . .	9 6	49 6	55 0	69 8	51 2	43 7	47 0	38 9	42 15
October . . .	9 10	46 8	55 0	70 6	51 13	45 12	45 2	38 4	41 11
November . . .	9 5	43 13	55 0	73 12	53 0	48 6	46 1	40 13	46 9
December . . .	9 4	45 12	55 0	75 8	43 4	47 2	43 8	41 8	46 13
January . . .	9 1	47 11	55 0	69 4	42 8	45 14	47 0	40 7	43 12
February . . .	10 0	44 1	55 0	60 12	43 0	45 6	46 7	40 3	40 5
March . . .	10 1	41 8	115 0	54 0	40 10	42 4	44 8	38 0	40 13
April . . .	10 13	50 4	105 0	46 4	39 0	44 8	43 0	38 6	41 11
May . . .	10 2	54 12	106 0	45 8	43 14	44 4	42 8	37 14	43 4
June . . .	9 15	50 4	99 8	47 0	47 0	44 2	42 3	37 13	43 7
Average . . .	9 12	47 3	72 2	64 0	45 5	45 1	44 13	39 9	42 10

Sources : Directorate of Economics and Statistics.
*Source : Jute Enquiry Commission's Report.
†I.C.J.C. Calcutta.

APPENDIX B-XXIX

Month-end Wholesale Prices of Hessian (40″×8 oz.) at Calcutta

(Rs. per 100 yards)

Month-End	Average 1936-37 to 1938-39*	1947-48	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56	1956-57
1	2	3	4	5	6	7	8	9	10
July . . .	7 13	45 0	43 7	68 8	35 10	36 8	36 8	35 0	31 10
August . . .	7 5	51 0	43 7	50 8	39 4	35 4	38 2	33 14	35 0
September . . .	7 6	48 0	43 7	57 0	46 0	34 8	40 8	32 4	36 0
October . . .	7 8	44 8	43 7	58 0	41 4	37 12	37 12	31 10	36 0
November . . .	7 5	44 0	43 7	62 0	39 12	39 0	37 4	32 10	36 14
December . . .	7 7	46 8	43 7	57 8	35 6	37 12	36 8	33 0	37 4
January . . .	7 10	47 12	43 7	54 8	34 8	37 8	37 4	32 12	36 4
February . . .	7 14	43 4	43 7	50 12	34 6	37 10	37 10	33 8	33 6
March . . .	8 1	41 8	86 7	45 8	33 0	35 4	35 10	32 4	33 8
April . . .	8 13	40 0	87 6	42 4	31 6	36 10	35 0	32 6	33 14
May . . .	8 1	38 6	81 12	41 8	34 6	37 0	34 0	31 14	34 11
June . . .	8 0	38 8	82 12	44 0	36 10	38 0	34 4	31 8	35 7
Average . . .	7 12	44 0	57 2	52 11	36 12	36 14	36 11	32 12	35 0

**Source.* : I.C.J.C. Calcutta.
Sources.—Directorate of Economics and Statistics.

APPENDIX B-XXX

Month-end Wholesale Prices of (Sacking B Twill) at Calcutta

(Rs. per 100 bags)

Month-End	Average 1936-37 to 1938-39†	1947-48†	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56	1956-57
1	2	3	4	5	6	7	8	9	10
July	21 13	110 0	155 12	254 0	94 8	100 14	106 6	112 12	103 2
August . . .	21 3	113 8	155 12	222 0	112 0	98 2	116 0	108 14	109 6
September . . .	21 10	118 8	155 12	260 0	122 8	92 2	118 10	105 2	112 8
October . . .	22 3	116 4	155 12	246 0	114 8	99 2	114 2	104 8	115 0
November . . .	21 13	118 8	155 12	246 0	95 0	104 2	128 8	115 12	120 14
December . . .	22 3	122 0	155 12	252 0	95 0	107 2	117 0	114 2	119 10
January . . .	22 10	124 8	155 12	238 8	93 0	103 0	123 6	111 8	115 8
February . . .	23 0	116 0	155 12	179 0	94 10	105 10	128 0	113 8	108 6
March . . .	23 4	116 8	261 0	155 0	93 0	106 2	125 6	107 12	110 14
April	24 8	123 0	262 0	144 0	86 12	113 12	116 0	106 12	111 6
May	23 4	131 8	267 8	116 0	104 4	111 12	110 2	105 4	116 15
June	22 14	133 0	260 0	115 0	103 4	113 10	107 0	102 12	115 5
Average . . .	20 11	120 3	191 5	202 5	100 13	104 10	117 9	109 9	113 4

†*Source.*—(i) I.C.J.C. Calcutta.
(ii) Directorate of Economics and Statistics.

APPENDIX B-XXXI

Number of Jute Mills and Looms in India

State	Number of mills	Number of Looms							
		Hessian		Sacking		Others		Total	
	1955	1953	1955	1953	1955	1953	1955	1953	1955
1	2	3	4	5	6	7	8	9	10
West Bengal .	101	43,352	43,576	22,218	22,004	3,728	3,501	69,298	69,081
Madras . .	4	387	262	655	790	..	..	1,042	1,052
Bihar . .	3	131	131	869	869	..	..	1,000	1,000
U. P. . .	3	224	208	581	597	..	..	805	805
Madhya Pradesh	1	25	35	195	185	..	..	220	220
TOTAL .	112	44,119	44,212	24,518	24,445	3,728	3,501	72,365	72,158

Source :—Indian Jute Mills Association.

APPENDIX B-XXXII

Working Hours of Jute Mills in India

Year (1)	Working Hours (2)	Limitation of Looms (3)
1st August, 1947 to 27th August, 1947.	Mills with more than 220 looms worked 48 hrs. per week others worked 72 hours per week.	10% looms sealed.
28th August, 1947 to 1st May, 1949.	60 hrs. per week. Electrically driven mills were permitted to work double shifts.	Do.
2nd May, 1949 to 30th June, 1949.	Mills in W. Bengal worked 48 hrs. per week, while mills outside W. Bengal remained unaffected.	W. Bengal mills having more than 220 looms worked with 12½% of the hessian looms sealed.
1st July, 1949 to 4th Dec. 1949.	Mills worked 48 hrs. per week with one week closed every month.	12½% of hessian looms of those mills in West Bengal having more than 220 looms however remained sealed.
5th Dec., 1949 to 9th Dec. 1951.	42½ hours per week .	12½% looms of West Bengal remained sealed as before ; but the greatest weight was on sacking looms. Mills outside West Bengal, however remained unaffected.
10th Dec., 1951 to 30th March, 1952.	48 hrs. per week . .	12½ % looms sealed in W. Bengal.
31st March, 1952 to 10th July 1954.	42 ½ hrs. per week . .	12½ % looms sealed.
12th July, 1954 to 16th Oct. 1954.	45 hrs. per week . .	12½ % looms sealed.
18th Oct. 1954 to 7th January, 1956.	48 hrs. per week . .	12½ % looms sealed
9th Jan., 1956 to 18th Feb. 1956	48 hrs. per week . .	10 % looms sealed.
20th Feb., 1956 to 14th July., 1956.	48 hrs. per week . .	5 % looms sealed.
16th July 1956 to 15th Sept., 1956.	48 hrs. per week . .	7½% looms sealed.
17th Sept., 1956 onwards. .	48 hrs. per week . .	12½% looms sealed.

N.B.—(*i*) Above 220 looms outside W. Bengal —48 hrs. per week without sealing since 1952.

(*ii*) With 220 looms and below—72 hrs. per week without sealing since 1952.

(*ii*) From 1951 onwards the working hrs. of mills cover I.J.M.A. mills and Gagalbhai and thremills who have left the Association in 1955 and represent 96·2% of Jute mills in India.

Source.—(*i*) Report on the marketing of Jnte and Jute products issued by the Indian Central Jute Commtee. (*ii*) Reports, Indian Jute Mills Association.

APPENDIX B-XXXIII

Indo-Pakistan Trade Agreement relating to Raw Jute

Date of signing the Agreement	Period of Implementation	Quota fixed for Imports	Actual Imports	Remarks
1	2	3	4	5
26-5-48 . . .	July 1948 to June 1949	50 lakh bales.	45 lakh bales (estimated by I.J. M.A.)	(*i*) Pakistan Jute could not be exported in raw form. (*ii*) Maximum export of Indian Raw Jute was allowed at 9 lakh bales.
24-6-49 . .	July 1949 to June 1950	40 lakh bales.	20·57 lakh bales (estimated by I. J. M. A.)	
19-4-50 . . .	April 1950 to 31 July 1950. Subsequently, extended to 30th September, 1950.	40 lakh maunds or about 8 lakh bales.	46 lakh maunds or about 9·2 lakh bales (Upto 18th October, 1950)	The types and quantities of raw jute and the then prices for delivery at Calcutta mills in Indian Rupee provided in the Agreement were :

Variety	Quantity (lakh maunds)	Prices for delivery at Calcutta mills in Indian Rupee per maund of 82 2/7 lbs.
Cuttings .	19	28
Hubbi-Jubbi .	1	30
Rejections	20	34
TOTAL	40	

26-2-51	(*a*) 26th February 1951 to 30th June 1952. Subsequently extended upto 31st August 1952. (*b*) For the rest of the period of 1952-53 there was no agreement. Import Licences, however, were granted to past importers and dealers of raw jute on their applications for reasonable quantities.	10 lakh bales 26th Feb. 1951 to 30th June 1951 and 25 lakh bales during 1st July 1951 to 30th June 1952.	8·86 lakh bales against 10 lakh bales and 14·50 lakh bales against 25 lakh bales 13-8-52. Total Imports during 1952-53 (jute year) were 13·03 lakh bales.	Out of 10 lakh bales 3·5 lakh bales held by Pakistan are to be supplied at agreed price and 6·5 lakh bales at market price.
20-3-53	For three years commencing from 1-7-1953	18 lakh bales for each year in case larger quantities be required by India, Pakistan will facilitate the exports of raw jute upto 25 lakh bales.	Total imports during 1953-54 (jute year) were 14·82 lakh bales and during 1954-55 the imports amounted to 12·46 lakh bales.	Pakistan abolished the Special Licence.
19-7-1955	1-9-55 to 31-8-56 subsequently extended upto 31-10-56 in the First instance and upto 31-1-57 in the Second instance.	18 lakh bales.	Total imports during 1955-56 (jute year) were 14·70 and 6·46 lakh bales during 1956-57 season.	
22-1-1957	For three years commencing from 1-2-1957	Raw jute has been included in this Agreement to as an item for export from Pakistan to India under special arrangements under Article VII applying to item C of the agreement. The quantity of jute will be indicated by the end of September each year.		

APPENDIX C-I

Area, Production and Yield of Raw Jute in Pakistan

Year	Area (000 acres)	Production (000 bales)	Yield per acre (bales)
1	2	3	4
1947-48	2,059	6,843	3·3
1948-49	1,877	5,479	2·9
1949-50	1,561	3,333	2·1
1950-51	1,711	6,007	3·5
1951-52	1,779	6,331	3·6
1952-53	1,907	6,823	3·6
1953-54	965	3,610	3·7
1954-55	1,243	4,662	3·8
1955-56	1,635	5,592	3·4
1956-57	1,230	5,514	4·5

Sorce :—Monthly Summary of Jute Statistics issued by the Directorate of Prices, Dacca.

APPENDIX C-II

Supply and distribution of Pakistan Jute from 1948-49 to 1955-56

(Lakh bales of 400 lbs. each).

Seasons	Supply			Distribution			
	Carry over	Production	Total Crop	Export Overseas	Export to India including smuggling	Home Consumption	Total
1	2	3	4	5	6	7	8
1948-49	3	62	65	30	30	3	63
1949-50	2	62	64	25	24	3	52
1950-51	12	68	80	44	30	3	77
1951-52	3	75	78	30	26	4	60
1952-53	18	75	93	40	18	5	63
1953-54	30	42	72	37	17	5	59
1954-55	13	50	63	39	14	6	59
1955-56	4	68	72	44	16	10	70

Source: Monthly Summary of Jute Goods Statistics issued by the Pakistan Jute Mills Association, Narainganj.

APPENDIX C-III

Stocks of Raw Jute in Pakistan

(End of Period) July—June	(000 bales)
1	2
1947-48	721·5
1948-49	375·2
1949-50	1,000·0
1950-51	100·0
1951-52	1,893·0
1952-53	3,065·7
1953-54	172·8

Source :—Annual Review of Jute in East Bengal, 1952-53 and 1953-54 issued by the Directorate of Jute Prices, Narayanganj.

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APPENDIX C-IV

Country-wise Exports of Raw Jute (including cuttings) and Mesta Fibre from Pakistan

(Lakh bales of 400 lbs. each)

Countries	1947-48	1948-49	1949-50	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56
1	2	3	4	5	6	7	8	9	10
United Kingdom	1·59	2·84	4·70	6·55	5·56	8·46	7·02	7·91	6·98
France	1·14	1·53	2·77	5·14	5·12	3·43	4·63	4·38	4·77
Italy	0·65	0·65	1·35	4·18	3·26	3·32	2·74	2·85	1·23
Spain	..	0·05	0·11	0·64	0·38	0·93	1·35	0·34	2·95
Germany	0·33	1·95	1·17	4·50	4·22	3·92	5·12	5·44	5·3
Belgium	0·80	2·37	0·82	4·45	2·79	4·07	4·26	4·70	5·91
Netherlands	0·05	0·09	0·41	0·94	0·71	0·84	0·67	1·02	0·99
Sweden	0·01	0·07	0·25	0·45	0·26	0·20	0·33	0·24	0·27
Poland	0·05	0·10	0·59	0·62	0·77	0·29	0·96	0·91	0·89
U. S. S. R.	..	0·44	0·43	0·40	0·96	1·45	0·82	..	..
U. S. A.	1·04	2·96	2·19	7·07	1·53	5·19	3·07	3·17	3·90
Brazil	0·23	0·18	0·18	0·64	1·03	0·04	..	..	..
Egypt	0·02	0·08	0·09	0·14	0·11	..	0·08	0·11	0·09

Argentina	0·27	0·50	0·28	1·44	0·42	0·17	0·77	1·14	0·34
China	0·01	0·01	0·05	0·36	0·23	..	..	0·65	2·38
Japan	..	0·31	0·22	1·45	0·99	1·58	1·50	1·65	1·85
Australia	0·17	0·05	0·09	0·30	0·10	0·06	0·23	0·24	0·18
India	53·08	39·08	16·60	25·58	16·81	15·29	13·31	12·31	13·57
Others	1·12	3·55	1·52	2·77	3·59	3·76	4·10	4·33	5·22
TOTAL	60·56	56·81	33·82	67·62	48·84	53·00	50·96	51·39	56·89

Source : (*i*) Monthly Summary of Jute Statistics, published by the Directorate of Prices, Dacca.
(*ii*) Annual Review of Jute in East Bengal issued by the Directorate of Jute Prices, Narainganj.

APPENDIX C-V

Country-wise Export of Jute Cuttings from Pakistan

(bales of 400 lbs. each.)

Countries	Period—July to June				
	1951-52	1952-53	1953-54	1954-55	1955-56
1	2	3	4	5	6
Argentina . .	10,023	5,577	43,282	55,245	15,718
Belgium . .	17,046	48,870	85,464	57,776	71,223
Canada . .	610	666	5,230	5,886	10,214
Denmark . .	3,806	4,836	10,657	3,924	4,698
East Africa . .	..	4,099	4,733	6,356	6,160
France . .	28,711	76,139	33,588	93,240	85,148
Germany . .	12,040	11,413	23,893	24,625	12,964
Ireland . .	1,426	1,606	3,092	1,612	2,739
Italy . . .	14,957	14,885	19,040	32,420	24,987
Japan . . .	10,616	7,784	5,415	3,579	9,274
Madgascar . .	..	2,996	1,495	914	4,704
Netherlands .	2,599	2,521	2,100	5,097	5,129
Portugal . .	..	..	112	728	7,269
South Africa .	7,034	19,690	26,052	46,533	31,046
Spain . .	7,644	53,283	48,939	5,236	12,841
Sweden . .	230	1,316	2,436	2,643	4,059
Switzerland .	..	..	2,712	2,224	12,964
United Kingdom .	16,956	35,806	20,450	13,187	21,806
Uruguay . .	1,143	3,365	3,119	5,593	5,692
U. S. A. . .	26,186	1,79,570	34,333	58,419	59,984
India . . .	3,82,212	4,64,971	3,58,711	2,829	6,51,577
Others . .	8,799	3,902	60,055	14,571	98,762
TOTAL .	5,52,038	9,43,295	7,94,908	4,42,637	10,58,958

Source :—Monthly Summary of Jute Statistics issued by the Directorate of Prices, Dacca.

APPENDIX C-VI

Production, Internal Consumption and Stocks of Jute Goods in Pakistan

(In Tons)

Period	Production				Internal Consumption				Stocks (End of period)			
July-June	Hessian	Sacking	Others	Total	Hessian	Sacking	Others	Total	Hessian	Sacking	Others	Total
1	2	3	4	5	6	7	8	9	10	11	12	13
1955-56 .	30,208	94,531	5,470	1,30,209	5,496	29,694	5,130	40,320	3,507	9,630	625	13,762
1956-57 .												
July .	2,887	8,636	147	11,670	459	2,738	172	3,369	3,731	10,336	599	14,666
August .	2,972	9,042	124	12,138	745	2,581	141	3,467	2,765	13,181	583	16,529
September .	2,932	8,536	161	11,629	754	3,455	121	4,330	2,566	14,706	617	17,889
October .	3,215	9,173	260	12,648	413	5,245	176	5,834	3,781	14,078	684	18,543
November .	2,851	8,874	216	11,941	604	6,062	240	6,906	3,743	12,293	692	16,728
December .	2,772	8,607	353	11,732	466	1,778	496	2,740	2,638	11,784	599	15,021
January .	3,111	8,632	378	12,121	358	3,871	338	4,567	3,824	10,480	717	15,021
July-Jan 57* .	26,021	78,278	2,542	1,06,841	3,799	25,730	1,684	31,213				

*Production figures are from July to March' 57

Source : (*i*) Monthly Summary of Jute Statistics issued by the Directorate of Prices, Dacca (*ii*)Monthly Summary of Jute Goods Statistics issued by the Pakistan Jute Mills Association Naraingnaj.

APPENDIX C-VII

Prices of Raw Jute in Important Centres of Pakistan

(Rs. per maund)

Period	Narain-ganj	Chitta-gong	Mymon-singh
1	2	3	4
1951-52 (July to June) Annual Average	..	39 11	42 7
1952-53(July to June) Annual Average	13 5	34 11	24 7
1953-54 (July to June) Annual Average	19 8	19 15	24 9
1954-55 (July to June) Annual Average	20 2	22 10	21 10
1955-56 (Month - end)			
July	17 4	36 3	14 11
August	22 15	36 13	20 15
September	23 15	37 4	21 3
October	23 10	38 4	20 8
November	N.A.	32 1	N.A.
December	26 0	33 2	21 6
January	28 13	35 2	24 6
February	32 5	38 4	25 14
March	33 11	38 4	29 4
April	32 0	37 4	27 11
May	30 8	37 4	26 12
June	29 14	37 0	28 4
1956-57 (Month-end)			
July	29 2	36 3	26 0
August	..	36 13	..
September	32 14	37 4	25 11
October	28 12	38 4	27 3
November	32 13	45 7	30 2
December	26 0	N.A.	21 6
January	N.A.	N.A.	N.A.
February	32 14	N.A.	30 0
March	32 12	N.A.	29 0

N.A:—Not available.

Source: Monthly Summary of Jute Statistics issued by the Directorate of Prices Dacca.

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APPENDIX C-VIII

Average Monthly Prices of Jute Manufactures in Pakistan

Hessian—Rs. per 100 yards—(45"x 10 oz.)
Sacking —Rs. per 100 bags— (B Twill).

Month	1953-54		1954-55		1955-56		1956-57	
	Hessian	Sacking	Hessian	Sacking	Hessian	Sacking	Hessian	Sacking
1	2	3	4	5	6	7	8	9
July	63 11	117 10	56 8	118 12	57 10	110 8	52 8	142 13
August	65 0	115 0	50 12	113 14	49 10	114 1	52 5	127 8
September	65 0	109 0	49 14	116 6	49 10	113 12	51 8	124 0
October	65 10	110 0	44 14	114 14	49 10	112 13	51 0	129 0
November	67 15	109 11	59 0	119 0	52 6	117 10	49 12	130 0
December	68 0	109 0	57 14	115 0	54 0	120 2	56 8	130 0
January	68 0	109 11	58 6	112 0	54 0	127 8	57 0	127 0
February	68 0	111 15	61 0	115 0	55 5	141 2	N.A.	121 14
March	67 12	115 5	61 0	114 8	55 9	151 13	55 4	124 14
April	65 2	116 15	61 0	113 3	54 2	147 0	N.A.	127 10
May	60 3	117 12	61 0	113 10	53 8	155 10	56 0	127 0
June	56 8	118 15	60 2	113 2	53 0	144 12	55 10	N.A.
Average	65 1	113 6	58 7	114 2	53 3	129 6	53 14	128 5

Source:—Monthly Summary of Jute Statistics, issued by the Directorate of Prices, Dacca.

APPENDIX C-IX

Export Duties on Jute in Pakistan

(In Pak. Rupees per bale)

Period	Raw Jute	Cuttings
From 14th November, 47 to 31st November, 48	15	4.18
From 1st April, 48 to 31st October, 51	20	6
From 1st November, 51 to 30th June, 52	35	10
From 1st July, 52 to 22nd August, 55	15	5
From 23rd August, 55 to 22nd August, 56	20	5
From 23rd August, 56 onwards	20	10

Source.—Industrial Fibres (1957 issue) Issued by the Commonwealth Economic Committee.

APPENDIX C-X

Number of Jute Mills and Looms in Pakistan

	Looms now working	Loom age
1. Adamjee Jute Mills Ltd.	2,500	3,000
2. Latif Bawani Jute Mills Ltd.	215	500
3. Bawar Jute Mills Ltd.	30	250
4. Amin Jute Mills Ltd.	482	500
5. Victory Jute Products Ltd.	201	240
6. Chittagong Jute Mills Co. Ltd.	500	500
7. Cresent Jute Mills Ltd.	500	500
8. Peoples Jute Mills Ltd.	648	750
9. Daulatpur Jute Mills Ltd.	213	250
10. Dacca Jute Mills Ltd.	250	250
11. Karim Jute Mills Ltd.	Not started	500
12. Nishat Jute Mills Ltd.	Not started	250
13. Platinum Jubilee Jute Mills Ltd.	Not started	750

Source: The World Jute—(December 1956 Issue) Published by M.M. Zaman Adeni, Moti-Jhil, Ramna, Dacca.

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APPENDIX D-I

Area, Production and Yield per Acre of Raw Jute in different Countries of the World.

Area—thousand acres.
Production—thousand bales of 400 lbs. each.
Yield—Bales per acre.

Country	1950-51	1951-52	1952-53	1953-54	1954-55	1955-5
1	2	3	4	5	6	7
India						
Area	1,411	1,951	1,813	1,228	1,243	1,739
Production	3,283	4,678	4,592	3,091	2,928	4,197
Yield per acre	2·3	2·4	2·5	2·5	2·4	2·4
Pakistan						
Area	1,711	1,779	1,907	965	1,243	1,635
Production	6,007	6,331	6,823	3,610	4,662	5,592
Yield per acre	3·5	3·6	3·6	3·7	3·8	3·4
Formosa	22	30	40	17	N.A.	N.A.
Area						
Production	39	61	110	28	72	110
Yield per acre	11·8	2·0	2·8	1·6	..	..
*Others**						
Area	173	490	633	597	691	691
Production	272	949	1,803	2,762	1,262	2,939
Yield per acre	11·6	1·9	2·7	4·5	1·8	4·3
Total						
Area	3,317	4,250	4,393	2,807	3,177	4,065
Production	9,601	12,019	13,228	9,391	8,924	12,838
Yield per acre	2·9	2·8	3·0	3·3	2·8	3·2

*—Includes figures for Nepal, Iran, Belgian Congo and Brazil.

Source: F.A.O. Year Book, 1955 and Monthly Bulletin of Statistics, 1956.

APPENDIX D-II

World Production of Jute Manufactures

Season (July-June)	India	Pakistan	Other Countries	Total
1	2	3	4	5
Average (1934-35 to 1938-39)	1,158	..	751	1,909
Average (1939-40 to 1946-47)	1,151	..	287	1,438
1947-48	1,076	..	416	1,492
1948-49	1,081	..	477	1,558
1949-50	858	..	419	1,277
1950-51	892	..	752	1,644
1951-52	983	1	566	1,550
1952-53	928	16*	676	1,620
1953-54	901	49	678	1,628
1954-55	1,029	75	697	1,801
1955-56	1,131	112	772	2,015

*—Figures relate to April to March.

Source: Commonwealth Economic Committee's Report.

APPENDIX D-III

Imports of Raw Jute into the Chief Importing Countries

(Thousand tons)

Country	1938	1947	1948	1949	1950	1951	1952	1953	1954
1	2	3	4	5	6	7	8	9	10
United Kingdom	161	64	93	96	113	114	100	173	125
Union of South Africa	..	..	..	..	2	14	7	14	20
Australia	2	3	5	4	2	5	6	1	5
Canada	1	3	2	4	3	5	(*c*)	3	1
Germany	103	10	20	50	52	71	77	86	85
France	79	58	61	54	72	116	62	99	84
Belgium	45	70	37	42	47	70	52	63	65
United States	46	40	75	62	78	105	44	93	56
Italy	40	16	25	23	34	63	43	61	49
Japan	19	..	6	10	9	26	20	31	26
Spain	11	12	5	4	2	10	11	21	9
Argentina	9	8	19	6	12	25	5	8	13
Netherlands	7	8	8	8	10	13	9	14	13
Austria	9	..	1	4	5	9	8	7	7
Phillipine	..	..	..	..	..	1	6	8	6
Irish Republic	4	4	3	4	6	5	5	7	6
Sweden	8	4	4	4	5	6	5	5	5
Portugal	3	5	6	1	9	10	10	4	4
Greece	1	1	1	3	3	3	3	3	4
Yugoslavia	..	3	2	1	1	2	2	3	4
Egypt	1	1	2	2	2	2	1	1	2
Brazil	25	2	27	9	5	11	16	..	..
Uruguay	..	2	1	1	2	2	1	..	1
India	..	..	755	276	314	402	270	239	216
TOTAL	574	314	1158	668	788	1,090	763	944	806

(*c*) Less than 500.

Source:—Commonwealth Economic Committee's Report.

APPENDIX D-IV

Exports of Raw Jute from the Chief Producing Countries

(Thousand tons)

July-June	Pre-Partition India	India (b)		Pakistan							
	Average 1934-38(a)	1948-49	1949-50	1948-49	1949-50	1950-51	1951-52	1952-53	1953-54	1954-55	1955-56
1		3	4	5	6	7	8	9	10	11	12
Seaborne—											
United Kingdom .	167	41	17	51	84	117	99	150	125	141	124
Germany . .	143	19	13	35	21	80	75	70	91	97	96
France . .	76	11	9	27	49	92	91	61	84	78	85
Belgium . .	57	13	29	42	15	79	50	73	76	84	106
United States .	70	20	12	53	39	126	27	93	55	57	70
Italy . . .	66	9	7	12	25	75	57	62	49	51	53
Japan . . .	23	3	3	6	4	26	16	28	27	29	33
Spain . . .	27	(c)	(c)	1	2	11	6	17	24	(c)	(c)
Union of S. Africa.	(c)	(c)	(c)	..	..	5	14	10	17	21	20
Poland . .	7	(c)	(c)	2	11	11	14	12	17	16	16
U.S.S.R. . .	15	14	4	8	8	7	17	26	15	(c)	(c)
Netherlands . .	20	(c)	(c)	2	7	17	12	26	12	18	18
Czechoslovakia .	74	2	7	7	5	11	10	4	5	(c)	(c)
Other Countries .	79	29	10	70	38	94	78	44	76	105	151
Total Seaborne .	754	161	111	316	308	751	566	676	673	697	772
Land Borne India .	..	..	..	698	296	457	300	266	243	220	442
Total Seaborne and Landborne .	754	161	111	1,014	604	1,208	866	942	916	917	1,214

(a) Average of the Five Calendar years.
(c) Included, if any, in "Other Countries."
(b) Exports of Raw Jute was banned from 1949-50.

Source: Commonwealth Economic Committee's Report.

APPENDIX D-V

Imports of Jute Manufactures into certain Countries

(Thousand tons).

Country	1948	1949	1950	1951	1952	1953	1954
1	2	3	4	5	6	7	8
United Kingdom . .	110	84	55	102	57	65	94
Australia . . .	111	113	98	124	51	75	..
Canada . . .	29	20	26	22	30	32	29
Nigeria & Gold Coast .	16	20	13	12	27	21	17
Kenya. Uganda & Tanganyika . .	10	13	13	18	8	6	15
Sudan	6	7	4	8	14	6	4
United States . .	271	249	252	210	277	248	242
Argentina . . .	69	73	60	70	75	96	..
Cuba	50	29	50	41	54	50	..
Indonesia . . .	..	..	13	12	20	28	24
Burma . . .	21	4	10	23	28	20	33
Netherlands . . .	16	10	11	13	15	16	17
French West Africa .	9	9	6	7	10	10	11
Egypt . . .	30	32	26	16	14	7	21
Belgium . . .	5	1	6	4	5	5	7
Indo-China . . .	10	11	20	7	6	4	8
Turkey . . .	2	2	3	2	8	2	5
TOTAL .	765	677	666	691	699	691	527

Sources: Commonwealth Economic Committee's Report.

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APPENDIX D-VI

Exports of Jute Manufactures from the Chief Exporting Countries

(Thousand tons)

Country	1947	1948	1949	1950	1951	1952	1953	1954	1955
1	2	3	4	5	6	7	8	9	10
India (a)	833	959	801	678	777	736	747	843	894
Pakistan								10	54
United Kingdom	16	17	15	19	19	18	16	16	19
Belgium	20	20	31	34	45	43	43	42	41
France	5	6	5	16	26	26	30	27	25
Germany	(c)	1	1	13	18	23	19	14	14
Netherlands	(c)	(c)	(c)	3	3	5	4	4	4
Austria	(c)	1	1	2	2	4	4	1	1
Spain	(c)	(c)	1	1	4	2	2	2	1
United States	6	4	2	3	2	2	2	2	4

(a) Seaborne exports only.

(c) Less than 500.

Source:—Commonwealth Economic Committee's Report.

APPENDIX D-VII

Whole-sale Prices of Raw Jute in Important Markets of the World

(Rs. per maund.)

Period	Dundee Mill Firsts U.K.	Mymensing E. Pakistan	Indian Jute Bottom, Calcutta.
1	2	3	4
1951-52 (July to June Annual Average)	70-10	42-7	47-0
1952-53 (July to June Annual Average)	41-1	24-7	24-0
1953-54 (July to June Annual Average)	50-1	24-9	27-8
1954-55 (July to June Annual Average)	50-13	21-10	30-8
1955-56 (July to June Annual Average)	46-3	22-14	27-8
1955-56 (Month-end)			
July	44-0	14-11	29-0
August	44-0	20-15	25-8
September	44-1	21-3	23-8
October	44-1	20-8	24-12
November	44-1	N.A.	27-8
December	44-9	21-6	27-8
January	47-8	24-6	29-0
February	50-7	25-14	30-0
March	49-7	29-4	27-8
April	49-8	27-11	27-0
May	47-11	26-12	26-8
June	45-0	28-4	27-8
1956-57 :			
July	44-10	26-0	28-8
August	47-8	N.A.	29-8
September	48-4	25-11	29-0
October	48-9	27-3	35-0
November	63-3	30-2	32-8
December	62-2	21-6	32-8
January	58-6	N.A.	32-8
February	53-8	30-0	27-8
March	54-6	29-0	28-8
April	55-12	N.A.	29-0
May	60-11	N.A.	31-0
June	59-4	N.A.	32-8

N.A.—Not Available.

N.B.— Prices from 1955-56 season & onward relates to London.

Sources: (i) Directorate of Economics & Statistics. (ii) Jute and Gunny Statistics of I.J.M.A. (iii) Monthly Summary of Jute Statistics issued by the Directorate of Prices, Dacca.

APPENDIX D-VIII

Wholesale Prices of Jute Goods in important Markets of the World.

(Rs. per 100 yards).

Period	Dundee Hessian 40"x 8oz	New York Burlap 40"x 10oz.	Pakistan Hessian 45"x 10oz.	Calcutta Hessian 40"x 10oz
1	2	3	4	5
1951-52 (July-June)	93 0	102 0	N.A.	64 0
1952-53 (July-June)	55 0	63 0	N.A.	45 5
1953-54 (July-June)	59 0	58 0	65 1	45 1
1954-55 (July-June)	63 0	57 0	58 7	44 13
1955-56				
July	57 0	55 0	57 10	42 8
August	57 0	51 0	49 10	40 9
September	57 0	50 0	49 10	38 9
October	57 0	49 0	49 10	38 4
November	57 0	50 0	52 6	40 13
December	57 0	49 0	54 0	41 8
January	58 0	49 0	54 0	40 7
February	60 0	N.A.	55 5	40 3
March	60 0	48 0	55 9	39 0
April	60 0	47 0	54 2	38 6
May	60 0	46 0	53 8	37 14
June	58 0	46 0	53 0	37 13
1956-57:				
July	57 0	47 0	52 8	38 3
August	58 0	49 0	52 5	41 11
September	58 0	52 0	51 8	42 15
October	60 0	50 0	51 0	41 11
November	63 0	56 0	49 12	46 9
December	64 0	56 0	56 8	46 13
January	64 0	54 0	57 0	43 12
February	62 0	53 0	N.A.	40 5
March	63 0	52 0	55 4	40 13
April	63 0	52 0	N.A.	41 11
May	N.A.	54 0	N.A.	43 4
June	N.A.	52 0	N.A.	43 7

N.A. Not Available.

Sources: (i) Directorate of Economics & Statistics (ii) Monthly Summary of Jute & Gunny Statistics by I.J.M.A. (iii) Monthly Summary of Jute Statistics issued by the Directorate of Prices, Dacca.

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APPENDIX D-IX

Percentage Imports of Burlap into U. S. A. from different Countries

(In percentage)

Country of Origin	1938	1945	1946	1947	1948	1949	1950	1951	1952	1953	1954
1	2	3	4	5	6	7	8	9	10	11	12
India . . .	91·20	98·90	95·91	95·95	95·52	95·52	86·66	82·59	82·34	77·83	82·40
United Kingdom .	3·99	1·10	1·52	2·79	1·13	0·55	1·16	1·34	0·64	1·59	2·26
Canada . . .	0·13	..	..	0·05	0·09	0·03	0·11	0·04	0·02	..	..
Belgium . . .	0·63	..	0·77	0·36	0·47	1·22	5·22	3·88	3·86	5·04	3·07
Netherlands . .	0·20	..	0·01	0·03	0·05	..	0·91	1·40	0·82	0·93	0·38
Czechoslovakia .	0·94	..	..	0·72	1·53	2·49	3·00	1·95	..	..	..
Germany. . .	0·44	..	..	..	0·06	0·02	1·62	2·81	5·69	4·84	1·40
Italy . . .	2·08	..	..	..	0·58	0·05	0·72	1·64	0·70	0·93	0·27
Austria . . .	..	..	..	..	..	0·02	0·33	0·40	1·16	1·85	0·11
Hungary . .	0·25	..	..	..	..	..	..	..	0·03	..	..
France . . .	..	..	..	..	..	..	..	2·20	2·82	5·97	2·74
Spain . . .	..	..	..	..	..	..	..	0·85	0·88	0·46	0·91
Others . . .	0·05	..	1·79	0·10	0·11	0·10	0·27	0·90	1·04	0·56	6·46

Source: (i) Jute Enquiry Commission's Report. (ii) Common Wealth Economic Committee's Report.

APPENDIX D-X

Numbers of Mills and Looms in different Countries of the World.

Country	No. of Mills	No. of Looms
1	2	3
India	112	72,365
U. K.	66	11,200
Argentina	5	120
Austria	3	735
Belgian Congo	1	200
Belgium	56	4,807
Brazil	27	4,987
China	14	756
Formosa	2	112
Czechoslovakia	79	2,000
Egypt	1	112
France	109	7,698
Germany (East)	5	N.A.
Germany (West)	28	N.A.
Iraq	1	N.A.
Italy	26	4,631
Japan	4	615
Nepal	1	117
Netherlands	12	1,300
Pakistan	6	6,000
Portugal	13	716
South Africa	2	700
Thailand	1	N.A.
Spain	N.A.	800
Philippine	1	600
Sweden	3	367

N.A. Not Available.

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CONVERSION TABLE

Decimal Coinage

In force from 1st April 1957

Annas	NAYE PAISE			
		3 Pies	6 Pies	9 Pies
0	..	02	03	05
1	06	08	09	11
2	12	14	16	17
3	19	20	22	23
4	25	27	28	30
5	31	33	34	36
6	37	39	41	42
7	44	45	47	48
8	50	52	53	55
9	56	58	59	61
10	62	64	66	67
11	69	70	72	73
12	75	77	78	80
13	81	83	84	86
14	87	89	91	92
15	94	95	97	98
16	100	..	..	..

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GMGIPD—NS—114 I.C. of A.R.—15-1-58—600.